

Trainer Resource Manual 2

Making Magic Happen

Expanding your facilitation skills



Amy Boleszny

Making Magic Happen (Extract)



© Sea Eagle Publications 2015

PO Box 217

Helensvale

QLD 4212

07 5502 6662

www.seaeagle.edu.au

ceo@seaeagle.edu.au

Introduction

In 15 Magic Words you prepared for your real work in vocational training: the delivery of programs that will enable change in individuals and workplaces to promote a more productive, flexible and adaptive workforce.

One of the topics of that publication have been reproduced here for the benefit of those people who just want to develop facilitation skills. The planning for facilitation is covered in 15 Magic Words.

The world of work has changed dramatically since I first entered it five decades ago. Back then it used to be:

Factory doors opened as schools released hordes of 15 year olds who would stay at their jobs until retirement.

Offices full of people who wrote documents by hand that would then be taken to a typing pool where women on manual typewriters would produce neat copy.

Setting rows of individual lead type font in galleys which would then be used to print sections in 16 page sequences that would then be collated and bound into books.

Computers literally being as tall as a house and as long as a street.

I am sure you can think of more things if you are old enough, especially if you work in agriculture, mining and health services.

Look at the changes that have happened in the last 50 years:

Our manufacturing industries are all but gone due to globalisation and outsourcing.

Computers on everyone's desk so that typing pools no longer exist and secretaries are rare beasts.

People like me being able to author and produce whole books without handwriting and on a BBC computer that was literally made up of a whole street of houses interconnected to house the magnetic tape hardware.

I now print this and other publications on a colour photocopier in my garage, where previously I would have sent them to a printing factory.

Sadly, my former printers

has closed its doors because the university it served has gone for entirely online learning and ebook.

In line with this my publications are increasingly going to be ebooks and eventually training materials will be electronic.

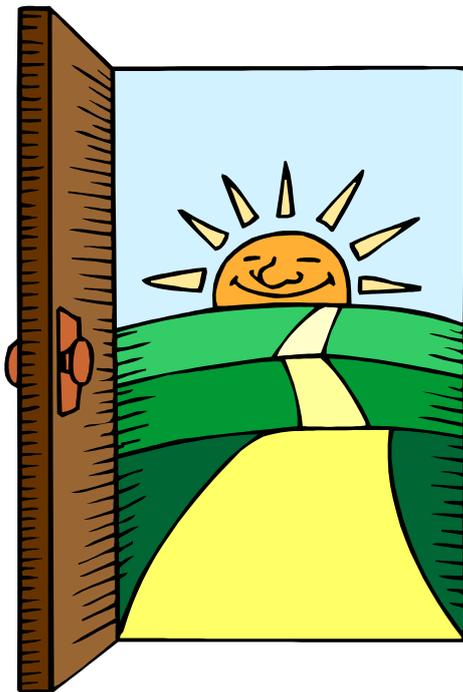
As training facilitators we are first and foremost the instruments of change. It is not enough to teach skills mechanistically, we also have to develop the ability to:

- use information effectively to make informed decisions and solve problems
- enable communication skills in order to form productive relationships with a very diverse range of clients, customers and co-workers
- develop negotiating skills in order to stave off or resolve conflicts, complaints and difficulties
- incorporate a great deal of knowledge to know why something is done the way it is and to propose changes to improve processes where old ways no longer work

Training is no longer 'monkey see – monkey do' (if it ever has been) but vocational education that exposes the individual to a wide range of 'soft' skills to help them manage their work in a world where our knowledge base is developing exponentially and our technology changes by the minute.

Follow the yellow brick road to success!

You might not have a killer pair of red sparkly shoes or a feisty little dog, but you can stage an event that will get quality outcomes. I cannot make you the world's best trainer. That has to come from you, your passion and your creativity. What I can do is show you the ropes.



It is said that we teach what we need most to learn ourselves.

On this stage of the journey, sometimes you:

- lead the way
- walk beside them
- follow their lead

The continuing journey

Before you began you:

Developed the knowledge to inform your quest

This part of the journey belongs to your fellow travellers (the students):

What is their destination (the change outcomes)

What makes a pleasant journey (user friendly training)

What you must provide them with (the needs of the client and the workplace)

What they need to succeed (the resources for learning)

Packing for the trip (pulling it all together)

Now you have set foot on the road, you will:

Reviewed your preparations

Choose the right methods to achieve the goals (the learning modes)

Explore interesting side attractions (adaptation for different clients)

Talk to fellow travellers (cross fertilisation of ideas)

Adjust your pack (prepare to be flexible)

Check your progress:

Talk to those who walk with you (feedback)

See if there are better ways to get there (learning as you go)

At your destination:

Look back over your journey (review)

Show off your brag book to others (on your CV or an e-portfolio)

Reward yourself by looking for a new journey to take

Contents

Introduction

Follow the yellow brick road to success!

Topic One: How the performers learn

Learning styles

Adult learning principles

Whole brain learning theories

Activities to engage the whole brain

The theory of memory transfer and equilibration

Topic Two: Becoming the virtuoso

The role of the trainer as a facilitator

The learner/facilitator relationship

Engendering trust

Being a good role model

Communication skills that empower

Active listening

Observation skills

Change management

Topic Three: Working magic in the workplace

How workplaces learn

Learning through work

Planning work-based learning

Planning specific organisational or job requirements

Defining learning outcomes

Evaluating the work process

Employability skills

Foundation skills

Core skills for work (CSfW) Framework

The Australian Core Skills Framework (ACSF)

Analysing language, literacy and numeracy skills requirements

Identifying the needs of individual learners

Identifying hazards in the training environment

Hazards specific to your training environment

Developing individual learner plans

Facilitating individual learning plans

Real time; real work

Mentoring

Setting up a mentoring session

Client centred approaches

Lateral thinking

Getting around the obstacles

Topic Three: Working magic in the workplace (cont.)

Coaching

Other useful techniques

Motivating the learner

There is more to work based training than 'Monkey See – Monkey Do'

Topic Four: The importance of rehearsals

Organising the resources

Making resource decisions based on cost

Costing support materials

Planning venues and physical resources

Costing training programs

Costing training and assessment activities:

Checking the training environment

Contingency planning

Being resourceful

Storyboarding

Getting the most out of presentation technology

Using flipcharts and whiteboards

The best use of handouts

Computers and group learning

We have the technology!

Topic Five: Magic in the classroom

Start-up activities

Conducting an induction session

Establishing the ground rules

Engaging the learners

Developing the generic skills

Providing opportunities for practice

Establishing group dynamics

Role playing to develop interpersonal skills

Using Q & A effectively

Continuing the support process

Motivating the learners

Group functions and dysfunctions

Group dynamics

Dealing with conflict and challenging behaviour

Strategies for resolving conflict

Providing feedback

Feedback is a two-way street

Topic Two: Becoming the virtuoso



The power is within you

Nobody can transform you into being a world class act. Like any other profession, so much depends upon who you are and how you choose to present yourself.

Certainly you can learn many 'tricks of the trade' but being able to perform over and over again means you also have to be:

- someone in tune with your audience
- able to change the pace and tempo to suit the individual or group
- flexible enough to think on your feet and adapt to the circumstances
- adept enough to read audience reactions to see how well your work is received
- reflective and evaluate each performance on its merits

Therefore, before you put all your plans and ideas into action, you first have to reflect on what makes you a good trainer, coach or mentor and why a facilitator means you move between roles.

Sometimes this means you have to let the audience run the show too!

The role of the trainer as a facilitator

Training is not just about standing up in front of a group and giving them information which they then have to process in some way to achieve an outcome. It is also about sharing the process: sometimes you lead, sometimes you let them take over.

Your role in the information exchange process is also to present a listening ear without comment or judgment in processes that promote interaction between individuals as willing participants in the learning process.

Most adult learners have a great deal of life experience which you can harness to make the learning experience more meaningful. Exercises such as brainstorming on case studies or group problem solving exercises can harness the energy of a group and allow the participants to assist each other to learn. Using dyad or triad grouping (one coaching, one learning or one coaching, one learning and one conducting observational assessments) can also be a powerful way to break down 'them and us' perceptions of trainers and learners.

When setting problem solving, peer mentoring or small group learning, it is important to remember that most individuals and groups solve their own problems, given the space to do so. Avoid the temptation to rush in with a solution.

Whether you are listening attentively to record feedback from group interactions, or in order to find appropriate ways of providing a strategy for solving a particular problem, you may also need to suspend your own value systems on occasion.

One group of process workers turned a communication workshop into a debate on gender roles in communication. Some of the class were traditionalist and considered that since they brought home the fish fillets and provided shelter, clothes and so forth, that their partners must take a subservient role. The debate inevitably took a turn towards a discussion on what constituted bullying or domestic violence, with disclosures from some group members that these 'traditionalist homes' were the ones with the most conflicts.

The trainer was tempted to intervene with her own views and opinions on the matter, but wisely stood back to allow the process to continue to its conclusion. In the end, it was the group itself that decided where the line should be drawn in the sand, with the result that two class members agreed that it was their own behaviour that incited disputes in the home and in the workplace.

You also need to make allowances for the different ways in which people process information. Some learners will be 'visual or imaginative thinkers', some are 'emotional thinkers' and some will be 'analytical thinkers'.



There are some rare individuals who blend all three styles of information processing, for example an imaginative thinker may also be very intuitive or an analytical thinker.

A musician who can literally feel the emotional impact of music is also operating within the abstract mathematical precision of musical notation.

People who can see both the big picture (imaginative or visual thinkers) plus act on the fine detail (analytical thinkers) are showing signs that they use their left (analytical) brain as well as their right (creative) brain in thinking processes. These people are literally 'whole brain' thinker or 'lateral thinkers'.

Making Magic Happen (Extract)

Your clues to how different people process information come in the kind of language they use.

This is Neuro-Linguistic Programming at its simplest level.

Visual thinkers: These people literally 'see' things in their imagination as they work through the reasoning process. They may have a natural ability in visual and creative arts or in work which creates something, even 'widgets'.

If you are talking about houses, for example, their brains will actually bring forward pictures of houses to their 'inner eye' as frames of reference for the conversation.

They will relate their understanding to these pictures and their language will contain clues like '*I see what you mean*', '*Imagine that!*' or '*Can you picture it?*'

These learners will often relate better to you if you 'paint pictures' with your words and use examples which call up images in their mind. The word 'Imagination' (creating images) is the clue to success here. This group of thinkers may also have highly developed visual memories or even eidetic recall (the ability to remember everything they see). Using visual aids in the learning process boost this natural ability.

Emotional thinkers: These people are often highly energized (negatively or positively) and base their reasoning very heavily on their feelings and intuition. They tend to gravitate towards people oriented workplaces and job roles and may have difficulties in fitting in to authoritarian or rigid management structures.

Their language is full of clues like '*I feel that*'; '*I sense that*'. These people respond very well to the use of kinesthetic activities during the listening process or even the use of music as an aid to learning.

These learners like to share their personal experiences and hear the personal experiences of others. Group work and problem solving will motivate them, as will learning materials with plenty of case studies showing how the theoretical is linked to the practical.

Analytical thinkers: These people tend to use the mind very logically to process information. They often work in professions which require them to organise sort and reprocess information, such as a scientific career, clerical jobs or research.

They respond best to language that is based on 'thinking' and logic and their words are full of statements relating to the workings of mind: "*I think*", "*I suppose*", "*I conclude*". Your answers need to be based on the same language, since analytical thinkers are notorious for excluding a language-based conversation not based on their own terms.

These people also like to be asked for their consent before being included in any group activity or training game which involves close contact.

Analytical thinkers like to be given the space to think through their problems and to come to their own conclusions based on the powers of deduction. The clue to dealing with this kind of thinker is to imagine that they have said to you "*Back off, man, I'm a scientist.*" Supply this kind of thinker with the facts, ask them to provide the solutions and let them work on it.

Your greatest ally in helping a learner is active listening. Learners like to feel that you have an understanding of how they organise their own learning, even to the extent of being a 'mother hen' with those learners who are highly dependent at first.

The learner/facilitator relationship

The key to maintaining and rounding out the relationship is the model you set for interpersonal relationships and communication skills.

Some trainers:

- confuse being friendly with forming friendships: there has to be a preservation of professional distance
- set too wide a distance, thereby appearing uncaring: the learner needs to be shown empathy in order to establish a relationship that fosters trust
- are too compassionate: there are times when 'tough love' will be required in order to foster independence and responsibility in the learner
- become too involved in the personal problems of the learner: there has to be a distinction between the role of a trainer and pastoral care
- are too rigid in the rules: there has to be an allowance for the learner to make their own decisions
- are too lax in the rules: there have to be agreed goals and a commitment to meet timelines and standards

Finding a balance between the extremes is essential to keep the relationship relevant and productive.

Another prime concern is confidentiality. Any information that passes from learner to trainer or facilitator may only be transferred to a third party in certain circumstances:

- assessments may be reviewed by a moderator or program co-ordinator
- learner files may be reviewed by auditors upon request
- learner files may be reviewed by program co-ordinators or others with a 'need to know' within the training organisation

Other than that, no information from or about the learner may be conveyed to a third person, or their work supervisor or employer, unless the learner has given their written consent to this.

To breach confidentiality is to breach trust. It is also important to keep all conversations and interviews between trainers, facilitators and learners as private as possible in the circumstances. Any discussion of a personal and highly sensitive nature should not be carried out in circumstances where it can be overheard, especially:

- disciplinary sessions
- counselling sessions
- disclosures of personal difficulties or family circumstances

To ensure that the relationship continues in a productive and effective manner:

- establish a collaborative learning relationship and engage learners in decisions and processes
- involve the learners in planning the goals and timelines
- follow the agreed sequence as closely as possible to keep things simple
- if changes are to be made, ensure that you explain to the learners the reasons and can be involved in making the adjustments
- ensure that the relationship between the learner and their peers or co-workers are maintained to assist the process
- monitor the learning process and the progress of the learner and use change management strategies to smooth the way

Topic Three: Working magic in the workplace

Making it real

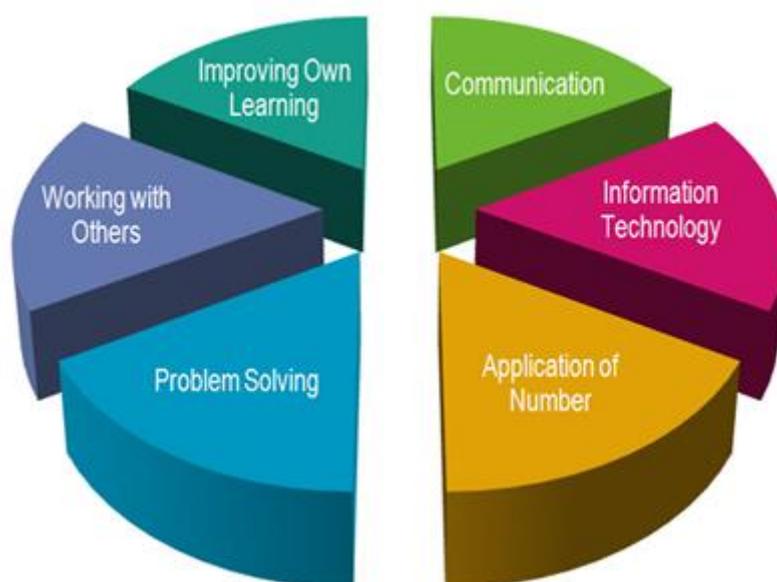
The first stage of empowering change is to understand how and why workplaces learn.

The next phase is to understand the work environment and what is required to help people develop their skills:

- what the job requires
- what the individual has already mastered
- what knowledge the person has and how well they apply it
- their transferable skills and how they use these
- the 'soft skills' like critical thinking and decision making and how they develop these
- then, there are the foundation skills that are illustrated below to integrate into learning.

Neither the workplace or the individual are blank slates.

The trick is to work with the foundation already there in order to achieve the goals of the business or enterprise.



How workplaces learn

A learning organisation is one in which the individual “cannot not learn because learning is so insinuated into the fabric of life.” Senge (1990) *The Fifth Discipline: The Art and Practice of the Learning Organization*.

People are the best investment any workplace can make.

Machines and processes cannot run themselves.

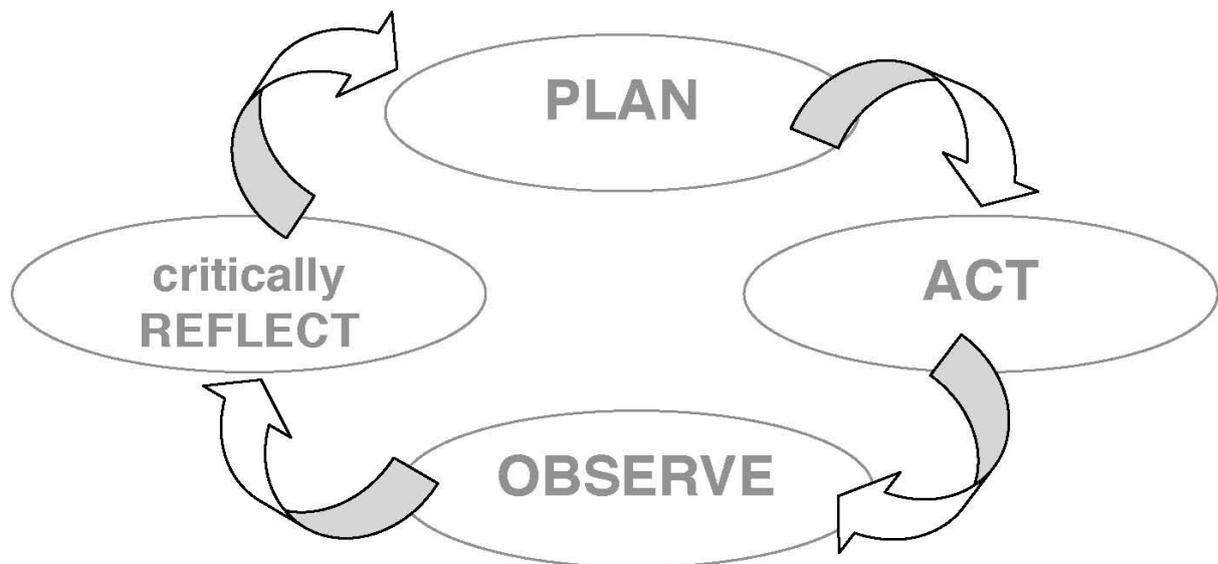
This means value adding through maintaining people skills

A workplace that learn avoids the ‘jerking knee syndrome’ (also known as putting out fires)

A Best Practice learning organisation works by innovating:

- planned collective actions, not reactions to problems
- structural/fundamental change, not just short term solutions
- flexibility and positive thinking, not solutions to short-term problems
preventative measures, rather than constantly putting out fires
- full staff involvement, not just the management or technical staff
- participative management (top-down, bottom up), not just top-down structures

To create a learning culture they follow a model like this:



This process has a purpose: to examine the performance of the workplace as a whole and, with an eye on the organisational goals, plan a system of skills development

Learning must always be planned. The plans must:

- build on what has been learned previously
- follow a timeline that includes formative and summative reviews
- be budgeted into professional development strategies
- assign responsibilities for leadership, team cohesion and attainment of outcomes
- document and analyse against measurable KPIs

Making Magic Happen (Extract)

As a workplace trainer, you have three major aims in the promotion of the benefits and principles of reflection and learning, to:

- increase the motivation of the individual to professional development and attain goals consistent with the deliverables of the project
- convince stakeholders that increasing the corporate knowledge base is a worthwhile goal in itself
- work with your colleagues to develop a learning organisation culture within your own workplace

In order to do this, you need to be convinced yourself that learning cultures and developing a learning organisation has real benefits for you as an individual and for your organization in general.

The process of development can be:

- informal sharing of new information
- formal presentations within the workgroup or at meetings
- attendance at in-house training sessions
- attendance at networking events
- attendance at workshops, seminars and conferences
- formal training leading to qualifications



Many organisations work towards the development of a learning culture by actively encouraging the development of learning teams. This includes mentoring partnerships.

Some of the key concepts behind mentoring include:

- Working together for promoting individual \ and organisational learning
- Sharing what is learned through Action Learning projects so that new information and skills are constantly integrated into work practices
- Using workplace learning and mentoring as a means of developing team cohesion and shared vision when developing and implementing projects
- Recognising that the journey is as important as the goal or destination
- Acknowledging that professional development practices are the key to quality improvements
- Using mentoring as a bridge to integrate knowledge into organisational culture

Once an individual has worked in a learning culture, it becomes natural for her or him to constantly reflect upon their own learning, share it with others and integrate new ideas into work practices.

Enthusiasm – the best technique in the world for communicating change ideas

If you want to sell people an idea – be enthusiastic about what you are communicating. If you truly believe that the following ideas have merit, then learn as much as you can about them, and then try them out for yourself in a small scale team project.

The learning organisation
Creating a learning culture
Lifelong learning

“Ford (1999) suggests that organisations can rate the extent to which knowledge is mediated into use by measuring the extent to which they have moved from and to the following goals:

Knowledge is:

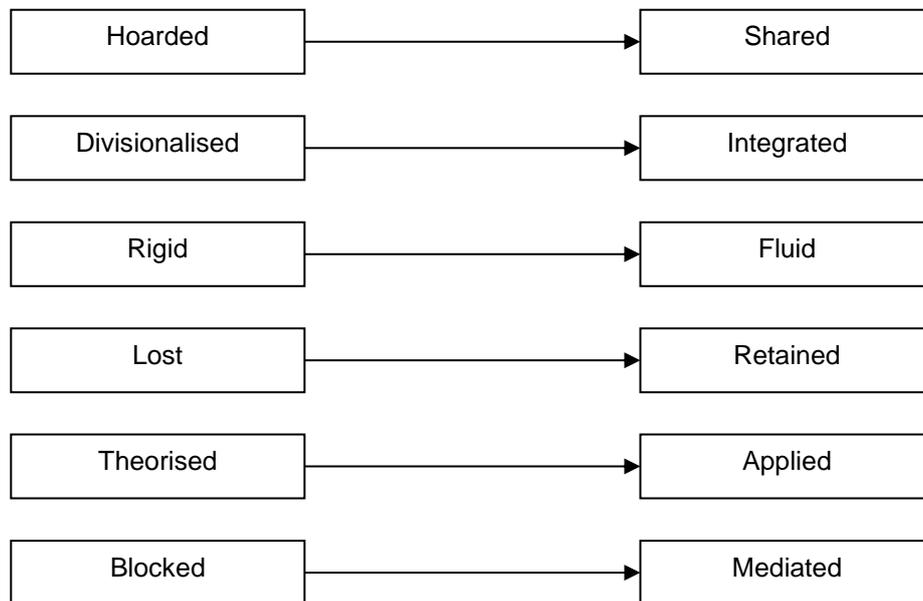


Diagram - Bill Ford 1999”

Note: The above citation is taken from *The Learning Organisation: Is it achievable in a human services context?* Annette Michaux: ACWA Conference 2 September 2002. I have been unable to source and cite the original article from which the diagram is taken.

Whether you are promoting learning cultures to individuals or on a wider scale, you must remain sensitive to resistance to change.



Many people are happy just as they are. Providing that this does not impede the development of the organisation or business, it might be wise to leave them on their plateau for the time being. In order for mentoring to work, the individual must invest in the process.

Attempting to force the issue by swamping them with new ideas might force them into stubborn resistance. Many people like to mull over new ideas and work out if the change is threatening or not before they move on them. They also like to see the results in action to see whether it is worth ‘sticking their necks out’ for something that might be just another ‘political football’ or a bee in your bonnet.

Be the observer

Watch how your colleagues adopt and adapt the ideas and document the benefits to team performance. This gives you the confidence to take the ideas out to the wider organisation, client organisations and individuals.

However, in order for a whole organisation to adopt the learning culture, the management must be sold on the idea first. To do this, you must be armed with summaries of how other organisations have benefited from implementing learning culture and learning organisation strategies.

Involving management in authorization of your mentoring project is a good way to test the waters. Your results may well be the catalyst for wider change.