

# How to Facilitate a Training of Trainers

## TIPS AND BEST PRACTICES



### A. Preparation

#### 1. UNDERSTAND THE CONTEXT AND DEFINE SUCCESS

A context analysis before the training can evaluate the following points:

- Where, when, and how will trainees be expected to apply what they've learned in this training?
- What will success look like two weeks, four weeks and two months after this session?
- What existing institutional structures, processes, goals and norms help or hinder the consistent practice of these behaviors and skills?
- What new leadership support, resources or partnerships could help trainees adopt their learning?

#### 2. ASSESS COMPETENCIES

It is essential to understand the current level of your trainers' facilitation skills and knowledge about the topic at hand before the training so you can adapt your content to their needs.

Once you understand your audience's competencies, focus your training on what each participant needs to improve for their cascading sessions.

Speak with or survey the trainees or their managers about:

- Facilitation experience and style (participatory vs. lecturing).
- Interpersonal skills (patience, communication skills, empathy, flexibility).
- Openness to learning new facilitation methods.
- Familiarity with the technical content of the training, institutional goals and target audience.

#### About Us

Vital Strategies is a global public health organization working in 70+ countries to strengthen public health systems. Resolve to Save Lives, an initiative of Vital Strategies, aims to prevent at least 100 million deaths from cardiovascular disease and epidemics. Through its Prevent Epidemics program, Resolve to Save Lives has rapidly leveraged existing networks to establish a multi-disciplinary, multi-pronged effort to support countries throughout Africa and beyond. This work is supported by Bloomberg Philanthropies, the Bill & Melinda Gates Foundation and Gates Philanthropy Partners, which is funded with support from the Chan Zuckerberg Initiative.

### **3. PLAN AND COMMUNICATE PROACTIVELY**

Your trainers probably have multiple responsibilities and busy calendars. To avoid cancellation and confusion:

- Send information in advance to communicate plans for training, a summary of the sessions and their main objectives along with a reading list for the trainers.
- Clarify how the training addresses an immediate need in their role and organization and aligns with their professional career aspirations.

### **4. CREATE A PARTICIPATORY CURRICULUM**

- Prepare an experience where the trainers can showcase and build upon their expertise and practical wisdom.
- People remember 20 percent of what they hear, 40 percent of what they see and 80 percent of what they do. Use videos, pictures and varied facilitation methods to enable practice and skill development.
- Budget time to teach the trainers new participative facilitation methods.

### **5. FOSTER EMPATHY AND INCLUSION**

Training requires exercising leadership skills of empathy, listening and curiosity.

- Create activities that explore the trainees' experiences and knowledge of community needs. Allow them to reflect on their new roles and responsibilities as trainers in the appropriate cultural context.
- Understand religious and cultural norms in advance and allocate time and space accordingly. For instance, ask about setting aside time for prayers, organizational protocols and dietary restrictions.

### **6. DEVELOP LEARNING REINFORCEMENT TOOLS**

- Prepare takeaway materials to improve the application of the new practices, like a portfolio of skills template, job aids, facilitation resources, case studies, best practices and guidelines.
- Provide tools for scaling the training, like presentation materials, trainer handbooks, video tutorials for easy reference, a checklist of materials for the training and a checklist of steps before the training.
- Provide checklists that encourage trainer to double check that their facilitation guide includes practical, participatory exercises that assess, address and evaluate learning.



## B. Facilitation

### 1. ENSURE THE TRAINERS FEEL SAFE

Learning is more accessible when learners are relaxed, cheerful, and trusting of their trainers and peers. Model the behavior that the trainers can use to train their target audience.

- Refer to people by their names to improve their sense of belonging.
- Use icebreakers and group activities to create a feeling of togetherness.
- Provide clear and candid feedback and acknowledge positive behaviors.

### 2. BE MINDFUL ABOUT THE NEEDS OF MARGINALIZED PEOPLE

- If individuals from a specific gender, ethnic, linguistic, or professional profile are underrepresented in positions of authority in that context, take the first question from a person from that group in Q&A. This signals to the other people from that group that their ideas and concerns are welcome and will allow the group to leverage the diversity of experience and opinion and move forward together.
- Use gender-neutral words, e.g., “staffing” and “people” vs. “manpower” or “guys.”
- Avoid stereotypes about gender, religion or other personal characteristics.

### 3. BE FLEXIBLE AND ADAPT TO THE TRAINERS’ CONTEXT

- Trainers will need time to adapt the materials and activities of your training to their context and audience and ask for clarification. This may require spending more time on certain parts of the content or activities to match the trainers’ needs.
- Be clear with yourself about where you can and cannot be flexible, so this becomes easier to do in real time.

### 4. ALLOW PARTICIPANTS TO TAKE CONTROL

Your participants should have ownership over their learning and time to practice a new activity or soft skill before facilitating it later.

- Give them opportunities to analyze problems and literature and share their reflections verbally or in writing.
- As they will have access to the content before, ask the trainers to introduce and facilitate some difficult parts of the training themselves to others at various points. Allow them to coach each other on new skills.
- Acknowledge that practicing the new learning will be challenging, but practice and patience are necessary for their growth.

## 5. NAME AND TEND TO EMOTIONS WITH SENSITIVITY

When facilitating training on sensitive topics, pay attention to the participants' emotions, e.g., if the work involves requesting confidential information or brings up personal issues around the loss of a relative in the pandemic. Some suggestions include:

- Identify likely sensitive issues that will require measured responses and preparation.
- Be clear about the boundaries—what is okay and not okay in training.
- Encourage moments of candid feedback, vulnerability and gratitude to create a connection between people. Discourage shaming and personal attacks.
- If you're taken by surprise, breathe. Listen without judgment. Select the appropriate means to move forward.

## 6. USE PARTICIPATORY EXERCISES

Team-based learning:

- If people expect to train as teams, organize them accordingly to teach back sections of the training. Provide a framework for offering clear, constructive and specific feedback to each other.
- You can also group trainers with different facilitation and technical skill levels together if you want them to coach each other. Or, group people with similar skill levels together so you can tailor your attention and assistance to each team.

## 7. ENABLE TRAINERS TO CREATE A CHANGE MANAGEMENT AND SCALE-UP PLAN

Trainings are often levers for facilitating institutional change. Help trainers reflect on their learning and create a strategy and execution plan for delivering on their goals. For example, leverage their expertise and insights to:

- Identify target institutions, teams and trainees who would benefit from the training.
- Set goals for completing a certain amount of trainings in a specific time frame.
- Conduct the preparation steps outlined in section A above.
- Use the template in Annex to prepare your cascading plan.



## C. Evaluation

It is easy to assess satisfaction at the end of the training, but this won't provide information on knowledge acquisition or behavior change/application. Instead, evaluate:

### 1. LEARNING

What knowledge and skills did they acquire, and at what level?

What concepts or practices need further clarification?

- Use the moment the trainers practice activities facilitating to validate and upgrade their learning.
- Use post-training reinforcement tools, if time and resources are available, and send those evaluation tools two days, two weeks, or two months later. Multiple choice questions/polls, short answer questions, micro-videos on similar topics can be used.

### 2. BEHAVIOR

How well or consistently do people apply their new knowledge and skills?

What institutional factors help or hinder them?

- Facilitate a closing discussion to identify their desired actions, potential roadblocks or bottlenecks and brainstorm possible solutions.
- Plan supportive supervision or coaching; create an action plan for the next 2-8 weeks.
- Provide work assignments to check the application of learning.
- Conduct follow-up interviews with both the trainee and the supervisor.



## D. Follow-up/Reinforcement

### 1. SUPERVISE CASCADING TRAINING SESSIONS

- Time permitting, consider supervising some of the first cascading sessions to point out difficulties in the facilitation or in the understanding of the topic. Report and share your feedback with the other.
- If in-person supervision cannot be done for the first sessions, set up a virtual space the evening after the training to provide support, feedback, and encouragement.

### 2. CREATE A COMMUNITY OF PRACTICE

- For a long-term, cascading training project that involves less than 40 participants, facilitating a community of practice would be an excellent way to create a lateral transfer of knowledge. The trainers will be able to share their relatable experiences and learn from each other during recurring events, or using a shared space online.

## E. Translating Learning to Action

### STEP 1: DEFINE THE CONCEPTS

Write 2-3 concepts you would like to see into practice into the first column of the table below and work through the remaining columns.

Hint: Review your reflection journal notes, lecture slides, and the posters to help inspire and clarify your thinking. Reach out to the facilitators and your colleagues for help if you get stuck.

Concept—Tool—Principle	What challenge could be improved using this new learning?	What simple steps could I take to apply this learning towards my challenge?	What issue or obstacle might I encounter in applying this new learning?	How might I overcome this obstacle? Who are my allies?
Concept 1				
Concept 2				
Concept 3				

## STEP 2A: CLARIFY YOUR CASCADE TRAINING PLAN

What are the Goals? What will success look like two weeks, four weeks, and two months after this session?

Goals 2 weeks after this session	Goals 4 weeks after this session	Goals 2 months after this session

Who is the intended audience?

Team or Institution	Number of Participants
#1	
#2	
#3	

## STEP 2B: INSTITUTIONAL FACTORS

What are the existing institutional factors (goals, structures, processes, and norms)?

Institutional Factors	Goals (regional, national, sub-national, long vs short term)	Structures (centralized, consortium, partnership)	Processes (complex, objective-oriented, person-oriented)	Norms (social, cultural, regulations)
Institution #1	Enabling:	Enabling:	Enabling:	Enabling:
	Inhibiting:	Inhibiting:	Inhibiting:	Inhibiting:
Institution #2	Enabling:	Enabling:	Enabling:	Enabling:
	Inhibiting:	Inhibiting:	Inhibiting:	Inhibiting:
Institution #3	Enabling:	Enabling:	Enabling:	Enabling:
	Inhibiting:	Inhibiting:	Inhibiting:	Inhibiting:

## STEP 2C: PARTICIPANTS

Who will be the participant? A table can gather information about participant roles and competencies as below.

Names	Team or Institution	Roles	Topic-Related Competencies Level		
			1=NOVICE	2=INTERMEDIATE	
			Competency #1:	Competency #2:	Competency #3:

## STEP 2D: NEW STRATEGIES

What new strategies are necessary to be successful?

Leadership support:	Resources:
Partnerships:	Other:

## STEP 2E: SCHEDULES

Training of Trainers Schedule:

Date(s):	Location(s)	Invitations sent by:

Trainer Session Supervision Schedule (date and location)

Trainer #1	Trainer #2	Trainer #3	Trainer #4	Trainer #5
Date:				
Location:				
Trainer #6	Trainer #7	Trainer #8	Trainer #9	Trainer #10
Date:				
Location:				

### STEP 3: SECONDARY PLAN

If I get stuck, I plan to: