

Leading Adult Learning

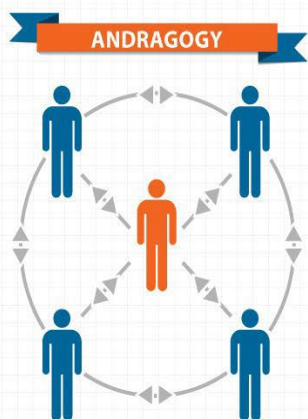
National UniServ and Organizer Program Facilitator Handbook

Leading Adult Learners is tough work. Leading learning for your peers is even tougher. Identifying the right content, designing the appropriate environment and knowing your own strengths as a learning leader are critical to everyone's success. This guide outlines our learning design theory, explores the characteristics of adult learners, provides processes for engaging adults, offers structures that support group learning, identifies strategies for questioning, and offers suggestions for dealing with difficult situations.

Lead Facilitator

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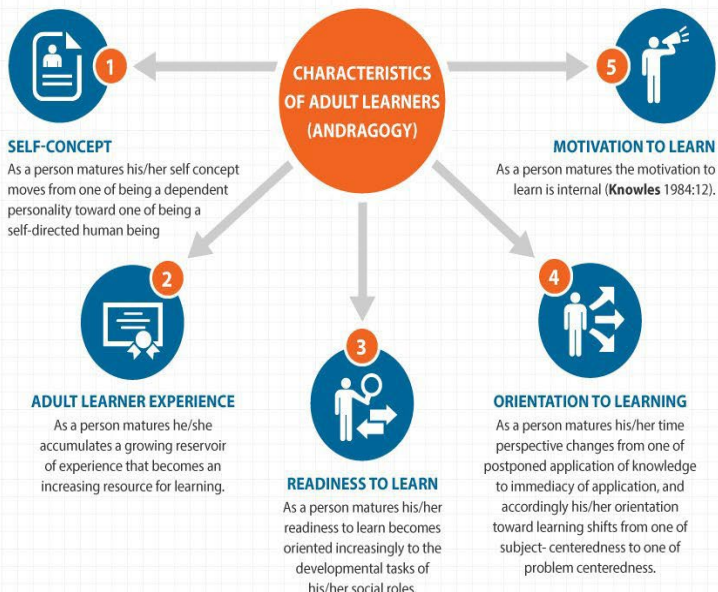


The term **andragogy** can be supposedly equivalent to the term pedagogy. **Andragogy** in Greek means man-leading in comparison to pedagogy, which in Greek means child-leading. However, it should be noticed that the term pedagogy is used since the Ancient Greek times while Alexander Kapp, a German educator, originally used the term **andragogy** in 1833.

KNOWLES'

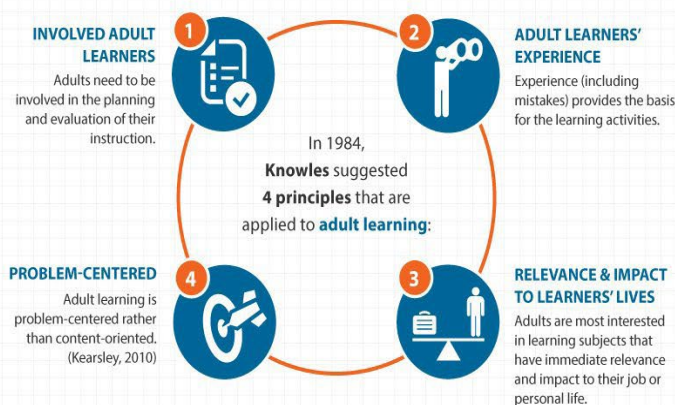
5 ASSUMPTIONS OF ADULT LEARNERS

In 1980, **Knowles** made 4 **assumptions** about the **characteristics of adult learners (andragogy)** that are different from the assumptions about the characteristics of child learners (pedagogy). In 1984, **Knowles** added the 5th assumption.



KNOWLES'

4 PRINCIPLES OF ANDRAGOGY



What Makes Adult Learning Good?

- Remember the Worst learning session you ever attended as an adult? Complete the table below with short phrases that describes the elements of that session, then do the same for the Best learning session you ever attended as an adult.

	The Best One Ever	The Worst One Ever
Participants		
Environment		
Trainer		
Materials		
Content		

- Compare and contrast your two sets of descriptions. Describe any patterns or trends that you see.
- Considering your experiences (good and bad), complete the following sentence:
Adult learning is good/effective when.....
- After you have completed 1-3, share your responses with others sitting near you. This time look for similarities and differences among the responses.

Popular Education and Why We Use It

The idea of popular education (often described as "education for critical consciousness") as a teaching methodology came from a Brazilian educator and writer named Paulo Freire, who was writing in the context of literacy education for poor and politically disempowered people in his country. It's different from formal education (in schools, for example) and informal education (learning by living) in that it is a process that aims to empower people who feel marginalized socially and politically to take control of their own learning and to effect social change. However, its roots may be found in the French Revolution, in workers' education of the 1920s-1930s, and in such movements as the Highlander Folk School in Tennessee (Beder 1996; Jeria 1990). The goal of popular education is to develop "people's capacity for social change through a collective problem-solving approach emphasizing participation, reflection, and critical analysis of social problems" (Bates 1996. pp. 225-226). Key characteristics of popular education are as follows: everyone teaches and learns, so leadership is shared; starting with learners' experiences and concerns; high participation; creation of new knowledge; critical reflection; connecting the local to the global; and collective action for change (Arnold et al. 1985; Mackenzie 1993).

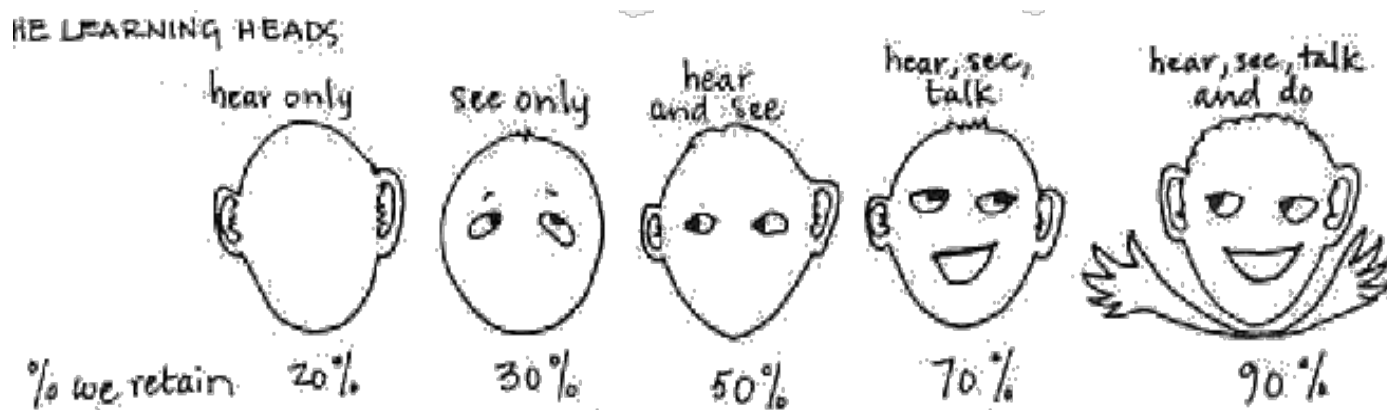
Popular education is a collective effort in which a high degree of participation is expected from everybody. Facilitators and learners aren't two distinct groups; rather, everyone teaches and everyone learns! Learners should be able to make decisions about what they are learning, and how the learning process takes place. A facilitator is needed to make sure that new ideas arise, progress, and don't get repetitive, but this isn't at all the same thing as a teacher. In popular education, then, we can't teach another person, but we can facilitate another's learning and help each other as we learn.

One important aspect of popular education is the way it often draws on the popular culture of the people attending the learning – such as scenarios, drama, song, dance, poetry, puppetry, mime, art, storytelling, and other forms. Proulx (1993) distinguishes "popular culture" from cultural institutions often perceived as elitist and from instruments of mass culture such as the media, identifying popular cultural forms as those in which "working class adults recognize their life and their values" (p. 39). The use of these forms can enhance communication among audiences with an oral tradition, demonstrate respect for community cultural values and enhance group spirit, demystify the information conveyed and make it accessible and relevant, and encourage participation and learning by appealing to different modalities. In the tradition of labor education, it builds solidarity and transforms ownership of content from the "elite leaders" to participants AND transforms participants from outsiders to insiders within the content. (Bates 1996; Proulx 1993).

In popular education, the learning process starts with identifying and describing everyone's own personal experience, and that knowledge is built upon through various activities done in groups. After the activity, a debriefing process allows us to analyze our situation together; seeing links between our own experience and historical and global processes in order to get the "big picture". Through the generation of this new knowledge, we're able to reflect more profoundly about ourselves and how we fit into the world. This new understanding of society is a preparation to actively work towards social change. In fact, in popular education, the education process isn't considered to be complete without action on what is learned; whether it be on a personal or political level.

The spiral model of learning is a useful tool when developing popular education workshops. (More information can be found in [Educating for a Change](#), p.38; see resource page.)

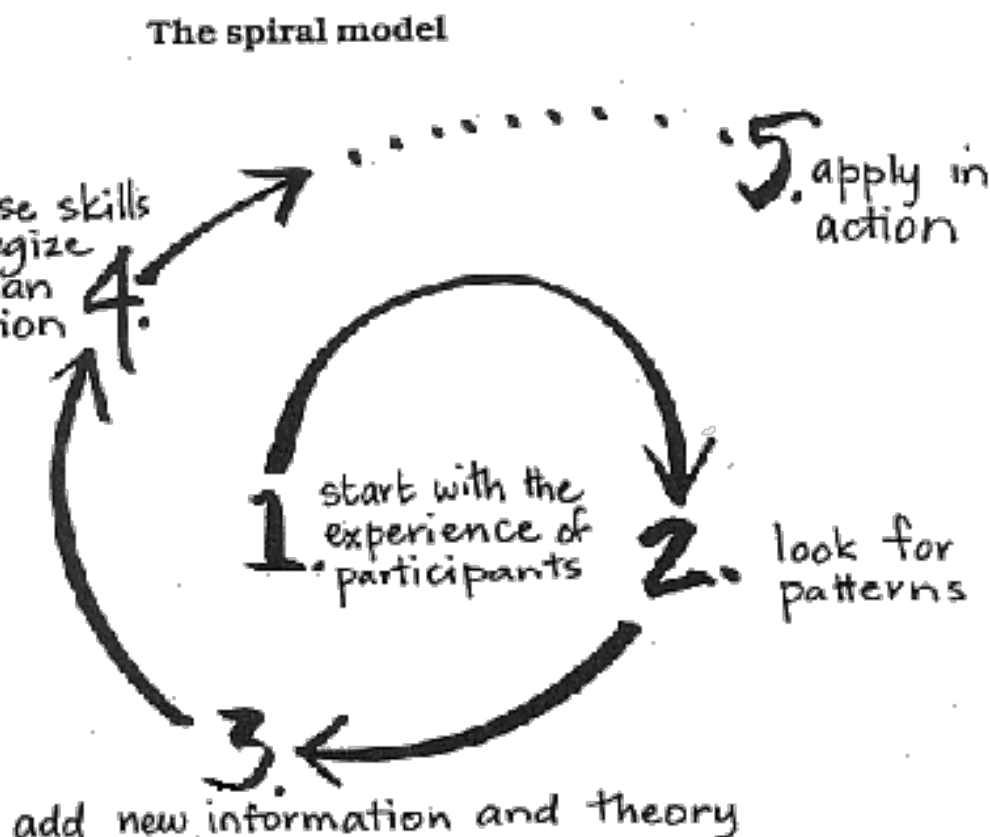
The spiral model takes into account how people learn. The diagram below is a quick reminder of how we learn best:



Below is a diagram of the spiral model. The spiral model suggests that learning begins with the experience and knowledge of participants. After participants have shared their experience (whether it be prior experience or the participants' experience from the activity at hand), they can look for patterns and analyze that experience. New information and theory can be collectively created (through facilitated discussion), or added by outside resource people. Once an issue or problem has been analyzed, it is important to practice new skills, strategize and plan for action so that the analysis is not passive.

As the goal of popular education is to lead to action for social change, the process must extend beyond the workshop. It is hoped that participants will return to their own groups and share the experience and thoughts from the workshop with others for further critique, strategy and applied action within the groups and daily living.

Popular education then is a process, continually moving through the cycles to gain better understanding and more effective action. When using popular education it is important to keep the principles in mind, as it is the goals of popular education and not simply 'experiential' activities that empower.



Effective Adult Learning

You don't need a degree in adult education to create excellent training courses. Follow the guidelines in this document, and you can develop trainings like a pro.

What's Different About Teaching Adults?

To be effective in teaching adults, it's important to know your audience and have a general understanding of how adults learn. Much has been written about the topic, and you can find suggestions for additional reading in Section 4: References.

To best reach adults, there are five key factors you should focus on in the development of your training:

1. The material presented should have immediate usefulness to the learners.
2. The material presented should be relevant to adult learners' lives.
3. The training environment should be welcoming so that all learners feel safe to participate.
4. The training presentation should be engaging.
5. The training should be presented in a respectful manner, where learners have an opportunity to share their experiences.

Following these key principles will help you determine what to include in your training and how to present it. Make your training relevant to the learner by recognizing the unique background and experience of people working in public health. To engage your audience, use examples or anecdotes showing how the material is relevant.

(Adapted from Knowles, M.L., The Adult Learner 6th ed., 2005)

How to Reach Adult Learners

You want to connect with your adult audience. Make sure your course is:

- immediately useful
- relevant
- welcoming
- engaging
- respectful

Make Connections

Stories, cases, and anecdotes help make connections.

Do you have a story related to your topic ready to share with your audience?

Principles of Adult Learning

Adapted from John Goodlad

ADULTS PREFER LEARNING SITUATIONS WHICH:

1. ARE PRACTICAL AND PROBLEM-CENTERED, SO...

- Give overviews, summaries, examples, & use stories to link theory to practice
- Discuss and help them plan for direct application of the new information
- Use collaborative, authentic problem-solving activities
- Anticipate problems applying the new ideas to their setting so, offer suggestions
- **CAUTION-** Guard against becoming too theoretical.

2. PROMOTE THEIR POSITIVE SELF ESTEEM, SO...

- Provide low-risk activities in small group settings
- Plan for building individual success incrementally
- Help them become more effective and confident through guided practice and establishing routines.
- **CAUTION-** Readiness to learn depends on self-esteem

3. INTEGRATE NEW IDEAS WITH EXISTING KNOWLEDGE, SO...

- Help them recall what they already know from prior experience that relates to the topic of learning.
 - Share your agenda and assumptions and ask for input. Adjust time for topics to fit their needs.
 - Use a continuum that describes a range of skill & knowledge. Ask them to apply stickers or marks showing what their current level of knowledge/skill is in the topic(s)
 - Ask what they would like to know about the topic
 - Build in options within your plan so you can easily shift to address needs.
 - Suggest follow up ideas and next steps for support and implementation after the session
 - **CAUTION-** Collect needs data and match the degree of choice to their level of development
-

4. SHOW RESPECT FOR THE INDIVIDUAL LEARNER, SO...

- Provide for their physical needs through breaks, snacks, coffee, comfort
- Provide a quality, well organized, differentiated experience that uses time effectively and efficiently
- Avoid jargon and don't "talk down" to participants
- Validate and affirm their knowledge, contributions and successes
- Ask for feedback on your work or ideas, provide input opportunities
- **CAUTION-** Watch your choice of words to avoid creating negative perceptions

5. CAPITALIZE ON THEIR EXPERIENCE, SO...

- Don't ignore what they already know, it's a resource for you
- Plan alternate activities and choice so they can adjust the process to fit their experience level
- Create activities that use their experience and knowledge
- Listen and collect data about participant needs before, during and after the event
- **CAUTION-** Provide for the possibility of a need to unlearn old habits or confront inaccurate beliefs

6. ALLOW CHOICE AND SELF-DIRECTION, SO...

- Build your plans around their needs, compare desired behaviors (goals) & actual behaviors
 - Share your agenda and assumptions and ask for input on them
 - Ask what they know already about the topic (their perception)
 - Ask what they would like to know about the topic
 - Build in options within your plan so you can easily shift if needed
 - Allow time for planning their next steps.
 - **CAUTIONS-** Match the degree of choice to their level of development . Also, since there may be things they don't know that they don't know, use a mix of their perception of needs AND research on needs and organizational needs and calendar to guide your planning.
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Motivating the Adult Learner

Another aspect of adult learning is motivation. At least six factors serve as sources of motivation for adult learning:

- **Social relationships:** to make new friends, to meet a need for associations and friendships.
- **External expectations:** to comply with instructions from someone else; to fulfill the expectations or recommendations of someone with formal authority.
- **Social welfare:** to improve ability to serve mankind, prepare for service to the community, and improve ability to participate in community work.
- **Personal advancement:** to achieve higher status in a job, secure professional advancement, and stay abreast of competitors.
- **Escape/Stimulation:** to relieve boredom, provide a break in the routine of home or work, and provide a contrast to other exacting details of life.
- **Cognitive interest:** to learn for the sake of learning, seek knowledge for its own sake, and to satisfy an inquiring mind.

Barriers and Motivation

Unlike children and teenagers, adults have many responsibilities that they must balance against the demands of learning. Because of these responsibilities, adults have *barriers against participating in learning*. Some of these barriers include lack of time, money, confidence, or interest, lack of information about opportunities to learn, scheduling problems, "red tape," and problems with child care and transportation.

Motivation factors can also be a barrier. What motivates adult learners? Typical motivations include a requirement for competence or licensing, an expected (or realized) promotion, job enrichment, a need to maintain old skills or learn new ones, a need to adapt to job changes, or the need to learn in order to comply with company directives.

The best way to motivate adult learners is simply to *enhance* their reasons for enrolling and *decrease* the barriers. Instructors must learn why their students are enrolled (the motivators); they have to discover what is keeping them from learning. Then the instructors must plan their motivating strategies. A successful strategy includes showing adult learners the relationship between training and an expected promotion.

Learning Tips for Effective Instructors

Educators must remember that learning occurs within each individual as a continual process throughout life. People learn at different speeds, so it is natural for them to be anxious or nervous when faced with a learning situation. Positive reinforcement by the instructor can enhance learning, as can proper timing of the instruction.

Learning results from stimulation of the senses. In some people, one sense is used more than others to learn or recall information. Instructors should present materials that stimulates as many senses as possible in order to increase their chances of teaching success.

There are four critical elements of learning that must be addressed to ensure that participants learn.

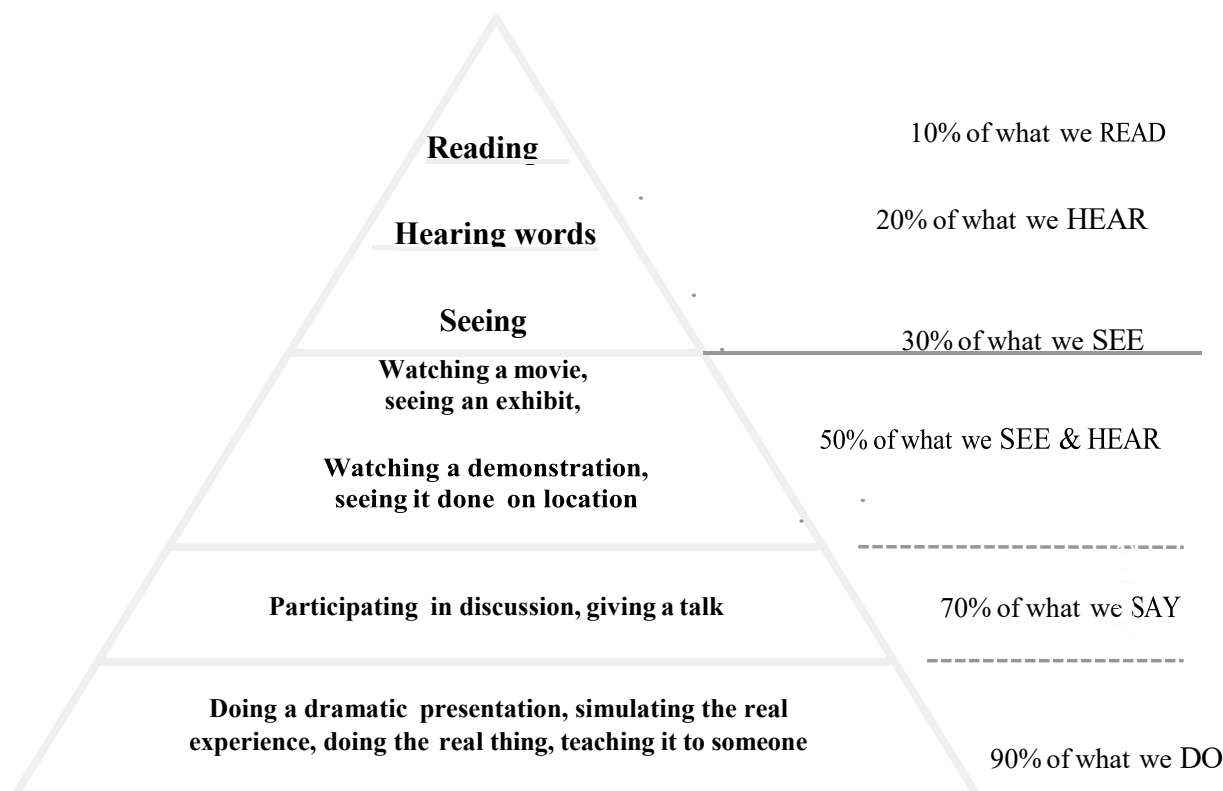
Adult Attention Span

When leading adults, it is important to keep in mind these facts:

1. The average human attention span is **8.25 seconds**.
2. Attention spans can range from **2 seconds to over 20 minutes**.
3. The average human attention span **decreased by almost 25%** from 2000 to 2020.
4. Humans have shorter attention spans than goldfish (**9 seconds**). (*Source: Cross River Therapy*)

When leading adult learners, a way to boost attention span is to switch “modes.” Modes are the ways that information is given or processed. We try to switch modes every 15 minutes. Some examples of modes are: reading, lecture, video, discussion, charting, problem solving. Even changing WHO is doing the talking can boost attention and retention. Moving into new groups or from sitting to standing in a new location are also attention boosters. The way that we structure learning can greatly increase attention and retention.

After two weeks, adults tend to remember...



(Based on the research of Edgar Dale, originator of “The Cone of Learning.”)

What is the difference between Training, Presenting and Facilitating?

	Training	Presenting	Facilitating
What do participants do?			
What do leaders do?			

Instructional Techniques: What's the Difference Between Training, Facilitating, and Presenting

July 19th, 2012



In a recent conversation with a course participant, the issue of terminology came up. This participant was concerned when she was asked to “**facilitate**” a session with two hundred people. It turns out that the purpose of this session was to deliver information on a new product—a “**presentation**,” not a facilitated session.

The terms training, **facilitating**, and **presenting** are often used interchangeably when, in fact, they differ depending on the purpose of the session. The purpose will determine the structure

of the session and the skill set used to deliver it.

The purpose of a training session is for learners to acquire knowledge and skill for use in their current job. In a facilitated session, the participants are guided through a process which might include generating ideas, analyzing the ideas, solving a problem, or making a decision. A presentation is a session where information is delivered to the audience to inform, persuade, inspire or even entertain. Trainers might use a facilitative style in a training session where they act as more of a “guide on the side” than a traditional trainer; but if the purpose of the session is for learners to acquire knowledge and skill, then it is still training. In addition, a trainer might deliver a lecture to present information in a training session. Again, if the purpose is for the learners to acquire knowledge and skill, the presentation will provide the knowledge and should be followed by some type of practice and feedback in order for the learners to develop skill, resulting in training.

If a trainer delivers a lecture and nothing more follows, then information has been presented but no training has taken place. Recently, a participant in one of my classes came to me after we had discussed the purpose of training. He said, “I just realized that I’ve been a trainer for five years but in the last five years I really haven’t trained anyone.” In his situation he was not able to follow his presentation with practice and feedback, so in effect he was a presenter not a trainer. What he did do, though, was to stop calling his sessions training and called them information sessions instead.

My point is that we have to call it what it is. There are great presenters who are very dynamic in delivering presentations and there are skilled trainers who use a facilitative style, but we always need to think of the purpose of the session to determine if it’s **training**, **facilitation**, or a **presentation**.



The Art of Facilitating

To pull off an effective training you must have a diverse training team with clear roles. Small group work is a cornerstone of engagement trainings and this section will focus on the basics of being a Facilitator – a skill that is important for every member of your team to become comfortable with.

Facilitator

Facilitators work with teams of participants to help them navigate and stay on track during the breakout sessions featured in each module. The facilitator role is vital because they not only serve as the main point person for the participants at your training, but participants will lean on them to clarify and explain each session, and help them put concepts and exercises into the context of their breakouts, and ultimately their own campaigns.

Typically, one facilitator can work with two teams of participants, rotating back and forth between the two groups and troubleshooting as necessary. This means for every ten participants you plan on having at your training, you should plan on having one facilitator.

An effective facilitator...

- Articulates clearly
- Suspends doubts and dives in with some faith
- Describes clearly the team work step by step
- Focuses the participants on the exercise and its objective at the outset.
- Respects time.
- Asks for help from the training team
- Chooses good models for debriefing
- Listens actively and holds people accountable
- Reports difficult cases
- Allows humor
- Facilitates discussions / does not have all the answers
- Comfortable with emotions
- Focuses on hope to deal with motivation, facilitates strategic understanding through coaching and gives/ provides specific feedback to address weak practice

An effective facilitator understands...

- The pedagogy of the workshop
 - That our job is not to resolve anxiety but to engage tension to enable learning
 - Learning is not a linear process and clarity can come at the end
 - What's going on--the pattern: lecture, teamwork, debrief
 - The learning objectives of every session
 - How to support participants and fellow facilitators
 - That modeling is as or more powerful than preaching
 - Appreciates that a successful organizing workshop addresses head, heart and hands
 - This workshop gives rise to sensitive topics and can trigger anxieties
 - That peer coaching is enabling leadership
 - How to coach through motivational, strategic, or skills based challenges
-

Climate and Environment – What is your Role?

What do you think is the difference between climate and environment?

Climate	Environment

Think about a good training you attended and a poor training you attended....what was the difference in their climate and environment.

Good	Bad

An Introduction to Climate and Environment Setting

Leading Learning requires the establishment of an atmosphere in which everyone feels free to participate, comment, questions, react, and to learn and apply their learning. This atmosphere is often referred to as “climate.” The initial task of the leader is to “set the climate” so that it is conducive to interaction and exploration.

Since the first need of most people in a new situation is to obtain information about what is going to happen, begin orienting participants to the course by presenting an overview. The course overview should cover the purpose, ground rules, definitions of terms to be used, and the sequence of activities in the course. It should provide trainees with information to begin to answer the questions: What is this course all about? What are we going to do? What is going to happen to me in this course?

An “expectations” exercise requires participants to identify some of their needs and hopes for the course. This data can be used to identify which expectations can and cannot be met through this course. In addition to identifying outcomes to be expected from the course, this structured experience helps trainees begin to answer the questions: Who are the other people in this course? What are they like? How are we similar? How are we different?

Also, an “expectations” exercise is an organized way of helping participants learn more about each other. It helps participants begin to build relationships with each other by dividing the large group into workable small groups; it facilitates the involvement of individuals in a newly formed group; and it allows participants to become acquainted quickly in a relatively non-threatening way. It also promotes a compatible climate and readiness for interaction within a group through the sharing of personal information and ideas.

In addition to establishing the learning climate at the beginning of the training, it must be maintained throughout the course. Climate setting activities are usually required at the beginning of each new session or training day. The questions raised in the initial overview and expectations exercises will usually resurface (even if they are not stated) as each new session is introduced. As the training program progresses, other climate setting activities such as energizers and breaks may be used as the trainer determines they are necessary.

Climate setting activities will require as much as 40% of the total time of the training. This time is best used when the climate setting activities assist the participants to learn and apply their learning to their home situations.

Purposes for Climate Setting

1. To prepare participants to respond positively to the goals of the experience.
2. To bring together the participants from their various “outside” thoughts and attitudes and relate them to the content of the learning session.
3. To establish an atmosphere in which participants will accept the “testing” and “experimentation” required of learning.
4. To build a group trust level which will permit interchange and exploration of ideas.
5. To prepare individuals for change.

Elements in Establishing Climate

- ➡ Meeting and Greeting Participants
- ➡ The Physical Environment
- ➡ Outlining the Plans / Rules / Arrangements
- ➡ Getting Acquainted
- ➡ Clarifying Expectations
- ➡ Getting Participants to Open Up

1. Meeting and Greeting Participants

- *Recognize that people are usually under stress when they encounter a new situation – even a good one.
- *As a matter of fact, SOME MAY NOT EVEN WANT TO BE THERE; OTHERS MAY BE THERE RELUCTANTLY; SOME COULD EVEN BE HOSTILE.
- *Their first meeting with the learning leader can be key in relieving anxiety or even hostility.
- *Whatever you do, you should be comfortable doing it. People will recognize when you are not.
- *Deal with the most common concerns of the group:
 - What do I do now?
 - Where do I sit?
 - How do I act?

2. The Physical Environment

The Physical Environment can affect:

*Room Arrangements *Grouping Participants *Chairs and Tables *Room Appearance *Temperature	*Comfort *Emotions *Readiness to Learn
--	--

Factors that Inhibit and Effective Learning Climate

- *Room arranged so that participants can't engage with each other.
- *Use of desk or lectern between participants and the learning leader.
- *Over-reliance on reading slides or materials to participants with no time for processing
- *Time is not well managed
- *Over reliance on one kind of media
- *Room is too large or too small
- *Too many participants

3. Outlining the Plans / Expectations / and Arrangements

Go over:

- *The Agenda
- *When Sessions Start and Stop
- *Breaks
- *Location of resources, personal care items
- *Key outcomes and Learners' needs

4. Getting Acquainted

Whatever process you select it should have multiple purposes:

- *Know something about each other – move from individuals to a group
- *Get everyone to talk at a low risk level
- *Start with interaction
- *Gather some data about who is in the room

Stay away from processes that are not linked to the content you are teaching and that will take too long. (example – Have each person sharing their name and their favorite teacher will take about 2 minutes per person. If you have more than 5 people, this is not a good WHOLE group process. Some processes can be at tables or with groups of people. There is not a need for everyone in the room to meet everyone else – just enough to feel like they are together in something.)

5. Clarifying Expectations

This is a very important step and it involves making a psychological contract with participants. You need to clarify and/or balance what the participants want and what you are prepared to lead.

ASK: What do you expect of -	Be explicit about what participants –
This learning experience	WILL GET
The learning leaders	MIGHT GET
Your fellow learners	WON'T GET

CRITICAL QUESTION: What impact do learner expectations have on instructional design?

6. Ways of Getting Individuals to Open Up

- Data gathering and feedback
- Shared readings and discussion protocols
- Use of group learning activities and processes
- Describe and apply new learning
- Review case studies
- Specific actions of a learning leader

ICE BREAKERS

Ice breakers are a great way to begin an adult learning event. They help to relax participants, and that makes them more receptive to listening and contributing. An ice breaker can also serve to build a team atmosphere and to generate enthusiasm. Ice breakers can be fun, amusing, humorous, thoughtful, surprising or just plain silly. The days of one-liner jokes as ice breakers are gone, and there are many new creative ideas. The most popular are games that have participants reveal something personal about themselves as it relates to the content, or which encourage participants to get to know each other personally – as it relates to the content. The idea is that more than just having fun, the ice breaker will truly help to create group cohesion based on trust and understanding.

One of the tricks of an icebreaker is timing. It should not be too long otherwise the serious work of the meeting will not be given enough time. Adults get easily frustrated when their time is wasted listening to 50 stories of, "My name is and my favorite teacher is..." It should not be so short that participants feel it was a perfunctory exercise. Timing also depends on the size of the group, the overall length of the event, and the purpose of the event. An all-day retreat might warrant a half hour ice breaker, but a one-hour meeting may merit only a minute or two. The following are some ideas compiled by category, and gathered from a variety of sources:

Games

Have participants say 3 things about themselves as it relates to the content- 2 true and 1 lie, others guess what the lie is.

Give each person is given a list of 5 to 10 traits that they must find in common with the people around them. Sample items could be: "Find someone that was born in the same month", "someone who lives in your state," or "drives the same model of car." A prize is awarded to the participants with the most in common.

Activities

Write the words "agree," "disagree," "strongly agree" and "strongly disagree" on separate pieces of paper and post them on four different walls of the room. Then make a statement such as "our organization can change the world" and have everybody move to the part of the room that matches their opinion. Have the group discuss why they chose their response.

Fold the Line – Ask participants to line up by some quantitative descriptor from least to greatest (years of experience in teaching) and then have the line fold in half so that the very least is paired with greatest, then the next pair and next and so on until the mid values are paired off. Ask each pair to introduce themselves and then pose a question for each pair to consider (What do you hope to learn today? What do you think _____ means?)

Simple Lead-Ins

Ask participants to state one or two "burning questions" they hope will be answered in this session.

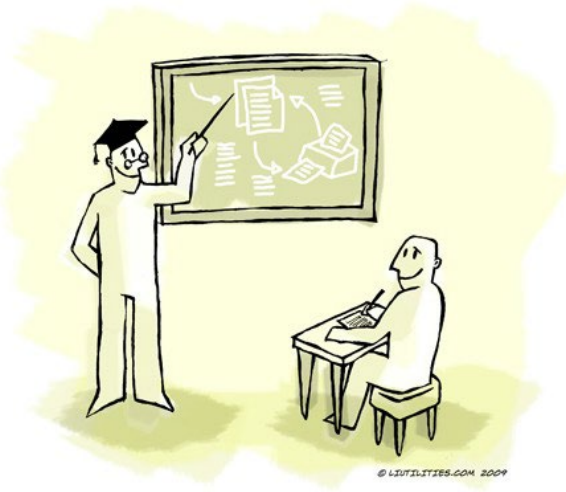
Have participants describe one strategy/resource they have used successfully (relevant to the topic of the meeting/training). Have them state their personal definition of the topic (eg. in a marketing meeting, "Participation Marketing means...").

One word whip – Ask the participants to think of a word that describes how they are feeling about attending your event – Then as quick as possible each person says their name and their word.

Be creative and come up with your own ice breakers!

General Rules for Learning Leaders

1. KNOW YOUR MATERIAL.....and prepare/organize for delivery
 - Read and explore content beyond content of Training Package
 - Use and practice the content outside the training session.
 - Constantly update and use examples. (Be personal)
 - Use crutches...your own notes, pre-written flip charts, overhead projector, etc.
2. KNOW YOUR TRAINEES
 - Check'em out in advance if possible.
 - Ask questions of the group about themselves.
 - Learn their names.
3. BE FLEXIBLE
 - Adjust your presentation to meet trainee's needs.
 - Give as much individual and climate as task.
4. LEARN FROM YOUR OWN EXPERIENCE
 - Receive feedback as honest input to help you and them.
 - Trainer should learn something and broaden his/her knowledge of the content and training process each time you train it.
5. ADULT LEARNING IS BEST THROUGH DOING
 - a) Experimental Learning uses their experiences, prejudices, past knowledge.
 - b) While doing, encourage them to be responsible, "own up", take risks.
 - c) Encourage them to experiment, see how it works.
6. DON'T BE JUDGMENTAL!
 - a) View no participant as unworthy.
 - Some people will not be advocates/leaders
 - But, let them experience this learning to make that judgement on their own.
 - b) Be open, compassionate, understanding.
 - c) Be supportive, show empathy, draw out.
 - d) No one is ever right or wrong from our perspective
 - If it's out of place, let group members challenge.
7. DO NOT ATTEMPT TO CHANGE THE ORGANIZATION OR PERSON
 - a) Create an environment for people to think about/consider them possibly changing the organization or their behavior.
 - b) They'll see you as manipulative.
 - c) It's an open forum
 - Present new ideas to merely think about.
 - You're not right; They're not wrong.



The Importance of Giving Clear and Concise Instructions

OCTOBER 14, 2018 ~ ALAYKKA FOWLER

Everyday of our lives, we encounter instructions or directions that we are supposed to follow. We are being taught about the importance of following specific directions and if we are not stupid enough, we tend to follow instructions most of the time. However, what “instruction-givers” don’t realize sometimes is that they should be able to also give clear and concise

directions (i.e. teachers who give examinations).

Giving clear instructions are very essential, especially, if the ones who are to follow these are taking important examinations, tests, applying for a job, etc. If these directions are too vague or hardly understandable, the persons being instructed tend to do the wrong process that they result to failing that exam or job interview. It is very frustrating for the receivers of the commands if they fail due to misunderstanding so one must first think of the clearness, understandability and simplicity of directions before giving it out to the people.

There was a time when a teacher in a private school gave a test on a chapter in the book to the class. Her instructions were to arrange the choices from the greatest priority to the least according to what we think or believe in. Clearly, she stated a direction that requires the students’ personal opinion. However, the students understanding of her instructions were wrong. It turned out that she wanted the students to arranged the choices according to what is stated in the book’s chapter. Everybody in class complained during checking time about being confused with the directions that she gave and she didn’t give any considerations in return. This resulted to the low scores that each student got. Isn’t that frustrating?

Now, so as not to give unclear directions, here are some tips to giving simple yet comprehensive instructions:

1. Think about what kind of people you are giving out instructions to.
 - Remember, people who you hand out directions to are not always the same. If you are giving these to students, make sure that these instructions are simple and clear and are related to the topic. If you are giving these to a bunch of professionals, make sure that these are polite, straight to the point and pretty “professional”.
2. Be specific, be precise.
 - One of the most crucial aspects to giving instructions is being able to say exactly what it is that you want. A simple way to be specific and precise in what you want is to write it out. Only when you have got it just right should you call the employee/student to give out the task. If you cannot articulate what you want yourself, how are you going to explain it to someone else?
3. Of course, making sure that there’s a good communication when instructions are given is really the responsibility of both parties.
 - When both parties are acting in good faith, there’s a good chance that a clear understanding

can be developed about the details of an assignment. But, there is no doubt that confused communications lead to decreased employee/student morale, while good communications are likely to increase it. So, a small amount of effort here is likely to have a big impact on employee/student morale!

I hope that these simple tips have been helpful to you and that you could apply these to real life to avoid conflicts between you and the employees/students.

Have a great day and give clear instructions!

Key Points When Giving Directions for Group Work

When participants transition to group work, clear, succinct directions are key.

First, is important that all members of the group are is ready to listen –eyes on you and not talking. Keep your directions short and simple and practice them.

Give logistical directions first, where to sit, whom to sit with, and what to bring with. Then LET THEM MOVE.

NOW THAT THEY HAVE MOVED - Next, give academic directions AFTER groups are settled and ready to listen.

Give a time expectation – either for when you will check OR when to be finished.

When possible, make directions visible and to have learners repeat the directions so that it's clear that all have heard them.

COACHING 101

“How do I enable others to find purpose in the face of challenge?”



ACKNOWLEDGEMENTS

We welcome your suggestions for improving this guide further for future trainings. We also welcome you to use it and adapt it for your own trainings, subject to the restrictions below.

The coaching framework is from the work of Ruth Wageman and Richard Hackman, and the full framework can be found in Wageman, 2010 "Toward a framework for coaching" Working Paper, Harvard University, and in Hackman and Wageman, (2005).

"Toward a theory of team coaching," Academy of Management Review, 30, 269-287.

Adapted here by Hope Wood, New Organizing Institute.

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COACHING:

FROM EXTERNAL CONTROL TO GROWTH

OBJECTIVES:

By the end of this training, you will...

- Learn a simple diagnostic framework and a 5-step process for coaching others in organizing efforts
- Practice the coaching process through role-plays and reflective discussion
- Learn to build a culture of coaching into your team

Why is coaching an important organizing practice?

Leadership in organizing is about enabling others to achieve purpose in the face of uncertainty. Coaching, put simply, is the act of enabling others.

Organizing campaigns are rich with challenges and learning opportunities, but sometimes we are fish in our own water and we cannot see the challenges we are swimming in. Coaching in organizing helps to alleviate this problem. Coaching helps individuals to overcome motivational, strategic, and informational challenges that might otherwise hinder the progress of the individual, and or the team, and thus the campaign or training.

What is coaching in organizing?

Coaching is a direct intervention in an individual or team's work process to help them improve their effectiveness.

Coaching is a leadership practice that is useful in a variety of contexts in organizing campaigns. Some examples of when coaching skills are necessary:

- Preparing leaders to get over the anxiety that most of us feel when we ask other adults to do tasks that might not be enjoyable.
- Facilitating the goal setting of a leadership team struggling with common understanding of the goals
- Debriefing with a leader who has not kept a commitment
- Helping a leader overcome motivational challenges with managing volunteer teams in the field
- Assisting a leadership team in creating strategy for their organizing campaign

Coaching is useful whenever we are working to enable others to build their own capacity to act, and though the contexts vary, the process is very similar throughout.

Effective Coaching Is	Effective Coaching Is Not
- Showing up and being present to another person's experience and listening, with both your head and heart	- Being so prepared that you figure out all the answers for the coaches before you even hear or observe their challenges
- Helping the coaches explore and make sense of their challenges and successes and what they learned from it all	- False praising of the coaches or only focusing on their strengths because you do not want to hurt their feelings
- Helping the coaches to find solutions to challenges	- Solely criticizing the coaches for their weaknesses
- Asking questions that both support and challenge the person you are coaching.	- Telling the coaches what to do

How do I practice coaching in organizing?

Good coaching requires learning how to identify a person's or team's strengths and weaknesses in order to find ways to help them mobilize their strengths to overcome their weaknesses. People often know what they "should" do, but a fresh set of eyes is helpful in diagnosing the specific challenges they're facing and initiating a brainstorm of solutions to maneuver through them. There are three basic practices of coaching:

Basic Practices of Coaching:

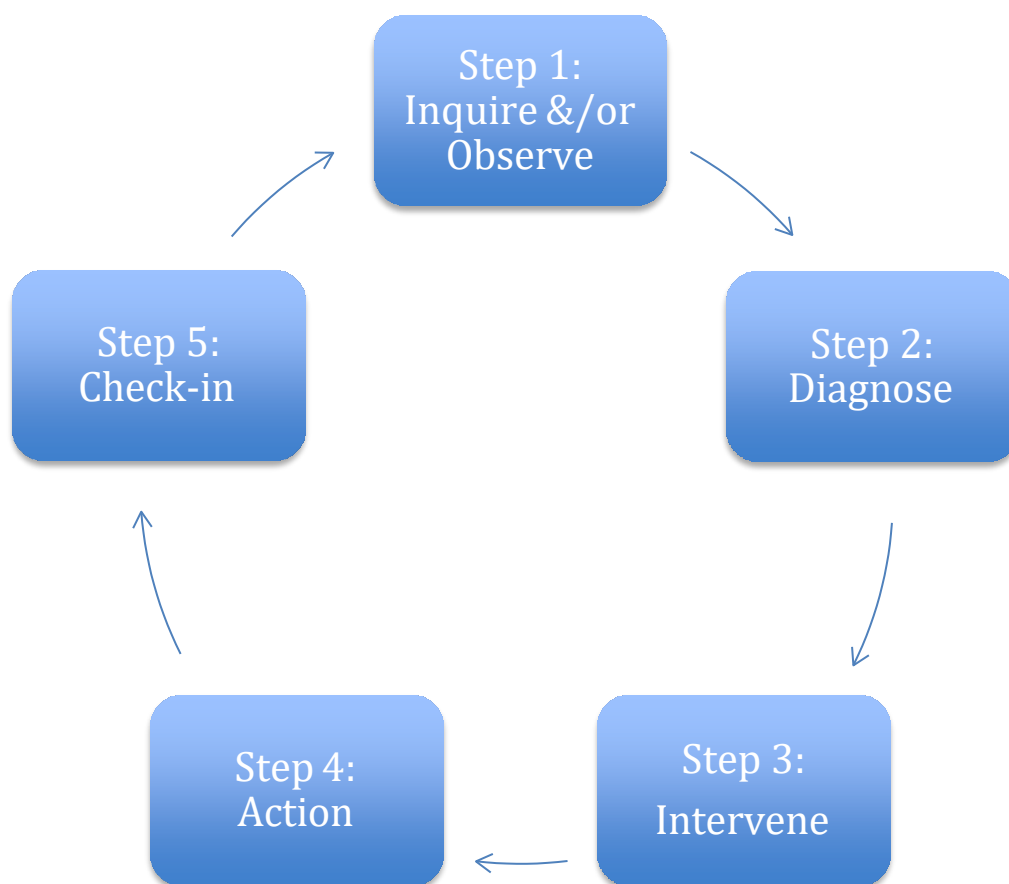
- **Motivational (heart) coaching** is aimed at enhancing *effort*.
- **Strategic (head) coaching** is aimed at helping the team or individual plan, evaluate, or think about its *strategic or structural approach*.
- **Skills-based (hands) coaching** is aimed at helping the team or individual *execute with skill* (and learn from execution).

The first part of effective coaching is diagnosing which coaching practice is most needed in any given moment. For example, if an organizer is struggling with strategy but you try using motivational coaching, it is likely to frustrate them further.

As is true for the other practices of leadership, coaching is a practice that only gets honed by DOING, and then reflecting on what works and what doesn't.

Following this simple, 5 step coaching process can help you dive in and begin your coaching practice:

5 Step Coaching Process



1. Inquire &/or Observe - What do I see and hear?

When you are observing a person's actions in the field or someone comes to you for help, your first inclination may be to draw conclusions from the initial observations you make. As a coach, you need to take time to dig deeper. Are you seeing all the angles here? What information is missing? Think about the "who, what, why, how, where, when" questions.

- **Motivational (heart):** Is the individual struggling because s/he is not putting forth enough effort? Is she not trying hard enough because she's embarrassed? Is he quitting too soon because of frustration or fear?
- **Strategic (head):** Is the individual struggling because the goals are not achievable? Or because they're not thinking creatively enough about how to use the resources they have to meet goals? Or because the overall strategy doesn't make sense and needs to be clarified or adapted to their situation?
- **Skills-based (hands):** Is the individual struggling because of not being able to muster the behavioral skill to execute effectively? Does he not have the skill in his repertoire? Is he getting interference from other habits and behaviors (like someone well-versed in marketing speak may think that skill set is a substitute for authentic story-telling skills)? Is there something you could model, or that this person that just needs more help practicing and debriefing?

2. Diagnose & 3. Intervene: Which form of coaching does this require? How will I intervene?

		
If your diagnosis is that the individual needs to put in more intense effort, choose a <i>motivational</i> intervention, – for example:	If your diagnosis is that the individual is not <i>understanding</i> the focal practice adequately, or thinking about it appropriately, choose a <i>strategic</i> intervention – for example:	If your diagnosis is that the individual lacks <i>execution skill</i>, choose an <i>educational</i> intervention – for example:
○ Encouragement and enthusiasm—you can do it! ○ Helping the individual understand and confront fear, embarrassment, or other emotions that get in the way of the willingness to try harder or persist in the face of setback ○ Incentivizing, rewarding and praising courage ○ Modeling courage and emotional maturity in your own behavior, confessing fear and explaining how you move toward it rather than away ○ Kick in the pants (offered with love) ○ What else?	○ Asking good questions about how the individual is thinking about the key leadership practice – “Why did you choose to do this and not that?” – Based on where you are now what resources could you draw on to take this story/team/strategy to the next level? ○ Offering your assertions about what you are observing and how you think the individual might fruitfully think about the practice differently – “When you stop at that angry point in the story, I think you may be forgetting that your listeners need a reason to hope in order to be called to action.” ○ Offering the opportunity for silent reflection and self-diagnosis – “Why don’t you take a moment to think through what you believe is working and not working and let’s talk about that?”	○ Model the behavior and invite the coaches to imitate you or work side by side with you to get the “feel” of the activity ○ Break it down into smaller parts and invite the individual to try one at a time ○ Practice, feedback, repeat ○ Offer three or four different practice exercises and observe which ones “take” for that person ○ Repetition, repetition, repetition ○ What else?

4. Action: How can I allow the coaches to develop their leadership skills? What action will they take that would allow them to move forward?

- Avoid the urge to do it for them.
- Allow the coaches to try the intervention.
- Observe them in action and note observations for your debrief.

5. Check-in and Debrief: What do I ask the coaches to help them reflect on their experience?

- What went well?
- What are you challenged by?
- What are some possible solutions?
- What are your goals/next steps?
- Schedule periodic check-ins to support your coaches in integrating this new or revised solution into their regular practice.
- Find out from the coaches how the situation has changed.
- Assess whether the diagnosis and intervention was successful. Celebrate success!

WORKSHEET:

REFLECT ON COACHING

How does this way of COACHING compare with other types of COACHING you have experienced?

What is most challenging and most new or interesting about this way of supporting others' development?

How could this type of coaching be used to help you support other organizers (volunteer and staff) out in the field? What are some of the practices that you will use next time you work with another organizer?

Coaching Cycle Scenarios – For Use with Coaching 101 Package

Below are 4 scenarios, you have been provided enough information for **Step 1: Inquire and/or Observe - What do I see and hear?** of the coaching cycle – and you are free to use a little imagination to round out the scenario. Your task is to determine what kind of coaching they need – **Motivational, Strategic, Skills-based.**

Scenario 1: The context – You are preparing leaders to get over the anxiety that most of us feel when we ask other adults to do tasks that might not be enjoyable.

This is a group of local leaders that have secured member volunteers to run a phone bank asking for campaign contributions for a school board candidate's campaign. The leaders are scared of hearing no's from their colleagues on the phones and are a little by the growing "clarifying questions" coming from their volunteers. Ultimately, they feel they should just scrap the whole thing because they are not confident that the volunteers will show up and they are sure they won't raise much money.

Type of Coaching: _____

Scenario 2: The context – You are facilitating the goal setting of a leadership team struggling with common understanding of what their campaign should be able to achieve.

The team members have a wildly divergent notions of what the outcomes should be and they keep shying away from setting a goal and straying into thinking about "cool" actions they could plan. It appears to you that they may not have run this kind of meeting before and they may not understand how to develop a plan for action.

Type of Coaching: _____

Scenario 3: The context – You are debriefing with a leader who has not kept a commitment.

The leader is relatively new and quite a bit younger than others at the worksite – but has good relationships and is well respected. The commitment was a relatively small one that was dependent on using already established relationships – a.k.a. "ask five friends to..." You get the sense that this leader has not taken this commitment seriously at all.

Type of Coaching: _____

Scenario 4: The context - Helping a leader overcome motivational challenges with managing other members across several worksites who are supposed to be making a face to face contact with each employee in the worksite to update contact information and establish a basic presence in each worksite.

The leader is having difficulty keeping the teams to following the protocol of relationship building – various teams are reverting to – "place a notice in the mailbox" – send a broadcast email – or are leaving it to one person at the worksite to do alone – or are not doing it at all. The leader has been shy to redirect the teams to the protocol of face to face contact and feels that it is "not their place" to question if other adults have kept up their end of the work.

Type of Coaching: _____

The Consultancy Coaching Protocol

15 mins	What	How
	Opening by Lead Facilitator	<i>Facilitator reviews protocol and adjusts time as desired by presenter or as fits the group. The group may decide to spend more time on the preparation section, or in the discussion. Timing also depends on how many are in the group.</i>
5	Presenter Shares	1. <i>Presenter shares the dilemma—this can be verbally shared or presenter can offer a written document. If a written description is shared, presenter can also verbally add anything he'd like before or after the group reads the document. It's appropriate for the group members to take notes about what they're hearing. Presenter might also share an artifact such as a transcript of a coaching conversation, an email, a plan for a conversation, etc.</i> 2. <i>Presenter can ask for feedback or input in one area or around one key question. Asking for specific feedback or support can help a discussion stay focused and useful.</i>
3	Clarifying Questions NOT Probing	<i>Group asks presenter clarifying questions. Clarifying questions are yes/no or require very short answers.</i> <i>The facilitator needs to interrupt if probing questions are asked and can remind the group that probing questions can be raised during the discussion.</i>
5	Group Fishbowl Discussion	1. <i>Presenter moves his/her chair outside of the circle and can take notes if desired.</i> 2. <i>The presenter can remind the group of the presenter's key question.</i> 3. <i>Group members can raise probing questions, share the insights they gained, and share any other comments or reflections they came up with. The facilitator can open this section by suggesting that each group member briefly (in about one minute) share his/her initial thoughts on the dilemma and the group can whip around so that all can share a thought before opening into a less structured discussion.</i> 4. <i>Group needs to ensure that discussion stays focused on the presenter's dilemma and if requested, on his/her key question. Group may also take actions to ensure equity of participation.</i>
2	Closing	<i>Presenter shares any reactions, insights, feelings about protocol or what was said; he/she doesn't need to respond to questions that were raised in the group discussion. If time permits, group can share reflections on process.</i>

General Coaching Sentence Stems

Active Listening Stems	Nonjudgmental Responses
• So... • In other words... • What I'm hearing, then... Is that correct? • What I hear you saying is... Am I missing anything? • I'm hearing many things... • As I listen to you, I'm hearing... Is there anything else you feel I should know?	• I noticed how when you...the students really... (to identify something that worked and why it worked) • I'm interested in learning (or hearing) more about... • I'd love to hear more about... • Thank you for sharing your thoughts. Can you tell me more about...?
Clarifying Stems	Probing Stems
• Let me see if I understand... • I'd be interested in hearing more about... • It would help me understand if you'd give me an example of... • So, are you saying/suggesting...? • Tell me what you mean when you... • Tell me how that idea is like (or different from)... • To what extent is...? • I'm curious to know more about... • I'm intrigued by... • I'm interested in... • I wonder...	• What's another way you might...? • What would it look like if...? • What do you think would happen if...? • How was...different from (or similar to)...? • What's another way you might...? • What sort of an impact do you think...? • What criteria do you use to...? • When have you done something like...before? • What do you think...? • How did you decide...(come to that conclusion)? • I'm curious to know more about... • I'm intrigued by... • I'm interested in... • I wonder...

Facilitative & Directive Coaching Stems*

FACILITATIVE	DIRECTIVE
Cathartic Stems - I'm noticing that you're experiencing some feelings. Would it be OK to explore those for a few minutes? - What's coming up for you right now? Would you like to talk about your feelings? - Wow. I imagine I'd have some emotions if that happened to me. Are you experiencing strong feelings?	Informative Stems - There's a useful book on that topic by... - An effective strategy to teach ____ is... - You can contact ____ in ____ department for that resource... - Your principal will be in touch about that. ____ is very effective at teaching that skill; maybe you could observe him.
Catalytic Stems - Tell me about a previous time when you... How did you deal with that? - I hear you're really struggling with... How do you intend to start? - It sounds like you're unsatisfied with... What would you do differently next time? - You've just talked about five different things you want to work on this week. The last thing you mentioned is... How important is this to you? - How do you want your students (or a particular student) to remember you? - How do you want to remember this time or situation in fifteen years? - Who do you want to be in this situation?	Prescriptive Stems - I would like you to discuss this issue with your supervisor. - You need to know that the school's policy is... - Have you talked to ____ about that yet? Last week you said you planned on doing so. - Would it be ok if I share some advice that I think might help you? You're welcome to take it or leave it, of course. - I'd like to suggest...
Supportive Stems - I noticed how when you...the students really... (To identify something that worked and why it worked) - It sounds like you have a number of ideas to try out! It'll be exciting to see which works best for you! - What did you do to make the lesson so successful? - I'm interested in learning (or hearing) more about... - Your commitment is really inspiring to me. - It sounds like you handled that in a very confident way. - You did a great job when you... - I'm confident that you'll be successful.	Confrontational (Interrupting) Stems - Would you be willing to explore your reasoning (or assumptions) about this? - I'd like to ask you about... Is that okay? - What's another way you might...? - What would it look like if...? Is there any other way to see this situation? - What do you think would happen if...? - What sort of an effect do you think...would have? - I'm noticing (some aspect of your behavior)...What do you think is going on? - What criteria do you use to...? - Who do you want to be in this situation? How do you want to show up? - How do you want others to see you in this situation?

* The labels for these categories—cathartic, catalytic, supportive, informative, directive, confrontational—are from the work of John Heron.

15 REFLECTIVE QUESTIONS EVERY FACILITATOR CAN USE

1. Define some of your most challenging moments. What made them so?
2. Define some of your most powerful learning moments. What made them so?
3. What would you say is the most important thing you learned personally? As a team?
4. When did you realize that you had come up with your final best solution?
5. How do you feel your solution relates to real-world situations and problems?
6. What do you feel most got in the way of your progress, if anything?
7. How well did you and your team communicate overall?
8. What were some things your teammates did that helped you to learn or overcome an obstacle?
9. How did you help others during this process?
10. Were your milestones and goals mostly met, and how much did you deviate from them if any?
11. What did you discover as being your greatest strengths? Your biggest weaknesses?
12. What would you do differently if you were to approach the same problem again?
13. What would you do differently from a personal standpoint the next time you work with the same group or a different one?
14. How can you better support and encourage your teammates on future projects?
15. How will you use what you've learned in the future?



Dealing with Challenging Behaviors

When thinking about how to deal with challenging adult learning behaviors, the first and most important rule to keep in mind as a facilitator is that the engagement between the participants and facilitator are not personal. The adults who come to us, just like you, have unique experiences that have pre-prepped how they will behave in a learning environment. We work to co-negotiate and set the boundaries for expectations for behavior – and these are necessary but not enough. Besides starting with a strong and intentional discussion of agreements for behavior of BOTH the facilitators and the participants, there also needs to be short bursts of community development amongst the participants. These are typically done best through low-risk, high engagement introduction and discussion activities. They are a must at the beginning and should be included all the way through an event. Skilled facilitators make these events that also support the concept or skill that is being taught. The least effective of these are what have been referred to as ice-breakers – while fun, without connection to the learning, you can set the expectation that we are not going to do anything tough together.

Your next set of considerations is recognizing what may be happening for your participants. Some challenging behavior in adult learning presents as anxious behavior. This can be brought on by a cognitive dissonance between what is thought and a new challenging concept, the pairing with another adult that may not be a great match, boredom or some other non-related issue. This anxiety might present in obvious changes in a participant's paraverbals (the inflection, pacing, pitch, and tone of speech; the emphasis one places on particular words, phrases, or pauses while speaking) or changes in facial expression. It could also include a puzzled look on someone's face or an audible sigh. It might involve removal of self from the situation. It can involve the verbal expression of frustration and angry outbursts.

Our first tactic for response is to be supportive. Examples might include:

- Asking if there is anything you can do to help
- Checking if there is a point that can be clarified
- Conducting a relevant exercise
- Asking the person if they might like a short a break

The challenging behaviors with which we seem to struggle most are those that fall into the defensive level. These are the behaviors that feel to facilitators that there is a challenge to our expertise or authority. These may also disrupt other participants and the classroom environment. Planning and having a continuum of responses from low control/high support to high control/low support can help the facilitator maintain their composure and keep the adults engaged. This continuum helps organize our thinking and maintain our professionalism rather than run the risk of losing our composure.

Some key reminders for all facilitators

- Know your content and your process for teaching it
- Remain calm and have a plan
- Respect personal space
- Be aware of your body language
- Pay attention to your own paraverbals
- Recognize that your effective response and behavior can influence a positive outcome

While not an all-encompassing list, below is a continuum of some specific strategies for challenging behaviors in the adult learning setting:

Challenging Behavior	Example	Strategy	Suggestions
Validation questions can be statements phrased as questions. Often, a scenario is described, and the person may want validation for how she responded to the situation.	<i>“So, would it make sense to identify a person as a leader if no one else has identified them as credible and respected?”</i>	Validate the proposed response if it meets the objective of promoting respect, service, and safety. Reinforce the participant’s response. If it does not support what is being taught – invoke the following rule – they asked my opinion- so in a respectful way share a correction. A good way to make this correction is to begin with, “Do you remember the key point of the lesson?” and get them to see that their response does not align with what is taught.	Most of the time, this type of questioning doesn’t appear as challenging at all. It’s usually easy to stay calm and model good problem-solving behavior yourself. A misstep by facilitators is their own perception of this question as “passive-aggressive” – always presume the face value of the words.
Choice questions are asked by a participant who has several answers, but is unsure which is the correct response. In most cases, the participant has a good idea which response is best.	<i>“Should I read the scenario first and then work with my team or should I work with my team, identify an issue then apply it to the scenario? Or should we just come up with our own answer?”</i>	Turn the question back to the participant, as this often enables them to answer their own question. The Facilitator (or even other participants) may be able to offer insights into the pros and cons of each option presented. This type of questioning is often in response to an open ended task or complex group task.	It is important to build participants’ skill in critical thinking and sound decision making around the learning we are constructing. This situation can result in examination of decision-making options for all. A mistake that happens here is when a facilitator repeats the directions for the task thinking that they are helping – and undoubtedly with complex tasks, the directions are said or heard slightly differently. Using printed directions to refer to, displaying the directions for all to see and knowing your directions well can help with

this. Key however, is ask what the person believes they should be doing – thus allowing them to build their confidence and decision making.

Challenging Question

“This is the stupidest thing I’ve ever heard. This model will never work! So then what am I supposed to do when this fails?”

Redirect the question back to the participant in a way that will help them apply concepts you are teaching. Avoid power struggles. This occurs when there is a large gap between participants’ currently level of belief and a new concept or skill.

We need to refrain from accepting any invitations to fight. Sometimes, challenging questions may be rooted in someone's anxiety about responding to a past or future situation. Sometimes asking additional questions to flush out the elements of the question is helpful. A good technique is to ask – “Tell me more about that?” in a way of seeking what the actual issue is. Work to not be defending – instead be seeking to understand.

Sometimes, you will have participants in your group who are not paying attention as you present information. This can be a problem if their behavior becomes distracting to others.

Participant repeatedly starts a discussion with other participants and continues talking when key directions or a call for attention is made.

Establish an agreement on the front end that others can ask a person to be quiet if they are being distracting. Utilize friendly eye contact. Use proximity control. Involve the person in an active way. Speak privately with the person at break. Privately offer the person a choice to stop the disruption and remain in the training or leave if she is unable to pay attention.

On rare occasions, you may have a participant who continues to present noncompliant or disruptive behavior. Do not try to force a person to participate. If the behavior continues to disrupt the training for others, you may need to privately and discreetly point out that the behavior is contrary to the philosophy being promoted in the course. These occurrences should be documented. Action taken should be within the policies and procedures of your organization.

When working with adults, there will be those who dominate the conversation.

Participant always wants to talk to the whole group, providing a response, sharing a story or wanting to ask a

Establish an agreement at the front end that participants need to monitor their “out loud time” and that others can ask the person to take a

On rare occasions, you may have a participant who continues to dominate the conversation. If the behavior continues to disrupt the training for others, you may

	clarifying question – but it is really a chance to tell a long story. This is a problem when it decreases the amount of learning time available.	pass so someone else can speak. Use respectful eye or hand signals allowing the person to know that they have been seen - and need to wait. Speak privately with the person at a break. Privately offer the person a choice to share the air-space with others and remain in the training or leave if she is unable to pay attention.	need to privately and discreetly point out that the behavior is contrary to the philosophy being promoted in the course. These occurrences should be documented. Action taken should be within the policies and procedures of your organization.
Refusal	<i>“I’m not doing this exercise and I’ll do as I please!”</i>	Respectfully encourage participation. Don’t force participation. Set limits that are simple and clear, reasonable and enforceable.	Refusal is often the escalation of a power struggle. Don’t engage in that struggle. Simply set limits as you would with anyone else in this situation.

Responding disrespectfully or inappropriately to challenging behavior from participants in the training environment will succeed in making things worse. Such responses erode our credibility, since we are saying one thing and doing another. Mistakes do happen. When they do, it is essential that time is created for the issue to be discussed. If it is on the minor scale – only the participant and the facilitator are likely to be affected– then a small private conversation in which the facilitator owns their role as establishing a strong learning environment and a recognition that their decisions created a less than perfect situation. Listen and listen some more to the participant. If the disruption is larger – multiple people have been affected – then a larger conversation – preferably in a circle needs to be set up. The process is the same - which the facilitator owns their role as establishing a strong learning environment and a recognition that their decisions created a less than perfect situation. Listen and listen some more to the participants.

While you should not take personally challenging behaviors – you are also completely responsible for your behaviors. A recognition that your own behaviors can be triggering and a part of the cause for the challenging behavior can help you limit large disruptions. Below are some behaviors and mannerisms that are great for being part of social group – and can trigger poor participant behavior when you are a facilitator.

- Sarcasm
- Exaggerated facial responses
- Over – sharing and long stories
- Presuming personal relationship
- Jokes about people present or not present in the room

Scenario Questions

1. You know that a number of the participants in your training session are coming because it is compulsory. They aren't pleased about attending under these circumstances. What might you do to motivate them?
2. You are training a group of your peers. You are afraid they won't accept you as a leader, but instead will treat you as one of the gang or discount what you have to say. What might you do to gain their respect as a content leader and motivate them to apply themselves during the training?
3. You don't know any of the people who will be attending your training session. You have no idea what they know about the topic at hand and have planned for a fairly basic overview of the content. At the training you learn early on that most of them already know what you plan to present. What can you do to create some interest in the training and motivation to work hard and learn?
4. About midway through your training people seem burnt-out, restless, and easily distracted. What would you do to re-motivate participants?
5. You notice that a number of folks are not "with you" – they are having side conversations, working on their cell phones or computers, and are not participating with their table mates. What would you do to address this?
6. During your session, you get a very pointed question/opinion from one of the participants that is a direct challenge to what you are saying. The tone of the question makes you feel defensive. Further you see a shift in the group towards this question/opinion. What would be some ways to address this and make it a productive experience for you and the individual?

TEACHING STYLE INVENTORY (TSI)

by Richard Brostrom

Teaching people for leadership roles in learning groups can be difficult, particularly when one consults the often conflicting "how to" literature on the subject. The classic debate between *behaviorists* (emphasizing control, shaping, prompting, reinforcing, token economy) and *humanists* (advocating freedom, spontaneity, student-centering, individuality, feelings) is just one example of basic differences.

A person new to facilitating and teaching can be confused by these separate advocacies or feel obliged to follow an unnatural "teaching" script simply because a text says it is *the* way.

DESCRIPTION OF THE TEACHING STYLE INVENTORY (TSI)

The Teaching Style Inventory is designed as an orientation experience--one that explores various beliefs about the teaching-learning process and helps a facilitator/teacher form decisions about the use of various methods and techniques. More than just techniques, however, participants learn about themselves and their personal impact on others in the teaching-learning setting. The goal is to develop a flexible set of alternative procedures and personal skills appropriate for learners, teachers, and facilitators, and for the task itself.

The TSI consists of 15 stem phrases, each of which has 4 completion statements. The completion items correspond to 4 major instructional orientations: the behaviorist, structuralist, functionalist, and humanist approaches.

SCORING THE TEACHING STYLE INVENTORY (TSI)

Sum all the numbers that you placed in the "A" and "E" boxes in the Training Style Inventory. Place this total in the "A + E" box in the table below. This is your behaviorist score. Do the same for the following totals: "B" and "F"; "C" and "G"; "D" and "H."

A+E	B+F	C+G	D+H
Behaviorist Score	Structuralist Score	Functionalist Score	Humanist Score
<i>"New behavior can be caused and 'shaped' with well-designed structures around the learner."</i>	<i>"The mind is like a computer; the teacher is the programmer."</i>	<i>"People learn best by doing, and they will do best what they want to do. People will learn what is practical."</i>	<i>"Learning is self-directed discovery. People are natural and unfold (like a flower) if others do not inhibit the process."</i>

Teaching Style Inventory

Instructions: For each of the following 15 phrases, rank the 4 completion statements given in the order that completes the phrase to your best satisfaction. Give your most favored statement a rank of 4; your next favored, 3; your next, 2; and your least favored statement, 1. Place your ranking for each statement in the square to the right of that statement.

	Your Ranking	
1. In planning teaching, I am most likely to...		
...survey the problem and develop valid exercises based on my findings.		C
...begin with a lesson plan – specifically what I want to teach, when, and how.		B
...pinpoint the results I want and construct a program that will almost run itself.		A
...consider the areas of greatest concern to the participants – and plan to deal with them, regardless of what they may be.		D
2. People learn best...		
...when they are free to explore – without the constraints of a 'system'.		H
...when it is in their selfish interest to do so.		G
...from someone who knows what they are talking about.		F
...when conditions are right – and they have an opportunity for practice and repetition.		E
3. The purpose of teaching should be...		
...to develop the participants' competency and mastery of specific skills.		A
...to transfer needed information to the learner in the most efficient way.		B
...to establish the learner's capacity to solve their own problems.		C
...to facilitate certain insights on the part of the participants.		D
4. Most of what people know...		
...they have acquired through a systematic educational process.		F
...they have learned by experience in trial-and-error fashion.		E
...they have gained through a natural progression of self-discovery rather than some 'teaching' process.		H
...is a result of consciously pursuing their goals – solving problems as they go.		G

5. Decisions on what to be covered in a teaching event...		
...must be based on careful analysis of the task beforehand.		A
...should be made as the learning process goes along and the learners show their innate interests and abilities.		D
...should be mutually derived, by the learner and the teacher/facilitator.		C
...are based on what learners now know and must know at the conclusion of the event.		B
6. Good teachers start...		
...by gaining proficiency in the methods and processes of training – how to teach – and then bringing in the content.		F
...by recognizing that learners are highly motivated and capable of directing their own learning – if they have the opportunity.		G
...by mastering the field themselves and becoming effective ‘models’ for the learners.		H
...by considering the end behaviors they are looking for and the most efficient ways of producing them in learners.		E
7. As a teacher I am least successful in situations...		
...where learners are passive, untalkative, and expect the trainer to do all the work.		D
...that are unstructured, with learning objectives that are unclear.		A
...where there is no right answer.		B
...when I am teaching abstractions, rather than concrete, specific ideas.		C
8. In a teaching event, I try to create...		
...the real world – problems and all – and develop capacities for dealing with it.		G
...a learning climate that facilitates self-discovery, expression, and interaction.		H
...a stimulating environment that attracts and holds the learners and moves them systematically toward the objective.		E
...an interesting array of resources of all kinds – books, materials, etc. – directed at the learners’ needs.		F
9. Emotions in the learning process...		
...are utilized by the skillful trainer to accomplish the learning objective.		A
...have potential if the trainer can capture the learner’s attention.		B
...will propel the learner in many directions, which the trainer may follow and support.		D
...provide energy that must be focused on problems or questions.		C
10. Teaching methods...		
...should be relatively flexible but present real challenges to the learner.		G

...should be determined by the subject.		F
...must emphasize trial and feedback.		E
...must allow freedom for the individual learner.		H
11. When learners are uninterested in a subject, it is probably because...		
...they do not see the benefit.		C
...they are not ready to learn it.		D
...the instructor has not adequately prepared the lesson.		B
...of poor planning.		A
12. Learners are all different:		
...some will learn, but others may be better suited for another activity.		H
...the best approach is to teach the basics well and put learners on their own after that.		G
...with an effective training design, most tasks can be mastered by the majority of learners.		E
...an experienced teacher/trainer, properly organized, can overcome most difficulties.		F
13. Evaluation of instruction...		
...is done by learners, regardless of the instructor; the instructor should be a sounding board.		D
...should be built into the system, so that learners continually receive feedback and adjust their performance accordingly.		A
...is ultimately decided when the student encounters a problem and successfully resolves it.		C
...should be based on pre-established learning objectives and done at the end of instruction to determine learning gains.		B
14. Learners seem to have the most regard for a teacher who...		
...taught them something, regardless of how painful.		G
...guided them through experiences with well-directed feedback.		E
...systematically led them step-by-step.		F
...inspired them and indirectly influenced their lives.		H
15. In the end, if learners have not learned...		
...the teacher has not taught.		B
...they should repeat the experience.		A
...maybe it was not worth learning.		C
...it may be unfortunate, but not everyone can succeed at all tasks.		D

Reflection Questions

1. In which instructional orientation (i.e. behaviorist, structuralist, etc.) your highest score? Your lowest score? Do your scores surprise you in anyway or reaffirm what you already know about yourself?
2. Review the Strengths and Limitations table below. For your highest rated instructional orientation, what are your visceral reactions to what is written in the table? Explain. Do you have any examples that reinforce these strengths or limitations? Explain.

	Strengths	Limitations
Behaviorist	"The Doctor": clear, precise, and deliberate; low risk; careful preparation; emotionally attentive; complete security for learners; a trust builder; everything "arranged"; protective; patient; in control.	"The Manipulator": fosters dependence; overprotective; controlling; manipulative "for their own good"; sugar-coating; hypocritical agreeing; deceptive assurances; withholding data.
Structuralist	"The Expert": informative; thorough; certain; systematic; stimulating; good audio-visual techniques; well rehearsed; strong leader; powerful; expressive; dramatic; entertaining.	"The Elitist": preoccupied with means, image, or structure rather than results; ignores affective variables; inflexible (must follow lesson plan); dichotomous (black or white) thinking; superior.
Functionalist	"The Coach": emphasizes purpose; challenges learners; realistic; lets people perform and make mistakes; takes risks; gives feedback; builds confidence; persuasive; gives opportunity and recognition.	"Sink or Swim": ends justify means; loses patience with slow learners; intimidating; insensitive; competitive; overly task oriented; opportunistic, return-on-investment mortality.
Humanist	"The Counselor": sensitive; emphatic; open; spontaneous; creative; a "mirror"; non-evaluative; accepting; responsive to learners; facilitative; interactive; helpful.	"The Fuzzy Thinker": vague directions; abstract, esoteric, or personal content; lacks performance criteria; unconcerned with clock time; poor control of group; resists "teaching"; appears unprepared.

3. Review the terminology on the next page of this handout. Circle the five bullet points that you would use to best describe your training style. How might these points be helpful to your co-trainers?

Teaching Styles

The following terminology has been adapted from Richard Brostrom's Teaching Style Inventory (TSI) to provide language to adult educators when identifying their teaching styles. It is likely that your teaching styles are pulled from multiple columns of instructional orientations.

Behaviorist	Structuralist	Functionalist	Humanist
• Clear, precise, and deliberate • Low risk • Careful preparation • Emotionally attentive • Complete security for learners • A trust builder • Everything 'arranged' • Protective patient • In control	• Informative • Thorough • Certain • Systematic • Stimulating • Good audio-visual techniques • Well-rehearsed • Strong leader • Powerful • Expressive • Dramatic • Entertaining	• Emphasizes purpose • Challenges learners • Realistic • Lets people perform and make mistakes • Takes risks • Gives feedback • Builds confidence • Persuasive • Gives opportunity and recognition	• Sensitive • Emphatic • Open • Spontaneous • Creative • Non-evaluative • Accepting • Responsive to learners • Facilitative • Interactive • Helpful

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Richard Brostrom is president of COMCOR, Madison, Wisconsin, a training and development consulting firm that publishes *Seminars*, the Directory of Continuing and Professional Education Programs. He is an organization development practitioner, a business development consultant, and a frequent workshop leader at the University of Wisconsin Management Institute.

Scoring and Understanding Your Leadership Style

What is Leadership?

The concept of leadership seems familiar enough. Yet defining the word precisely can prove challenging, perhaps because leadership is a concept rather than a thing. You cannot see it, or hear it, or touch it. How, then, can you begin to define leadership?

One good way to construct a definition is to list those things you must observe to know that leadership is occurring. To build a definition from the ground up, think of an empty stage. What do you need to place there for leadership to occur? Surely you need a leader. At the same time that you put a leader on stage, you must also put a follower there, for a leader can exist only in relation to a follower. What must occur between the two actors if leadership is present? The leader must influence the behavior of the follower. In what way? A leader influences a follower to achieve a predetermined goal. Now all the conditions are in place, and you can observe leadership in action.

What is Style?

Style can be defined as the way a person usually behaves when he or she is able to do things his or her own way. Often you can predict how someone whom you know well will behave in a given situation. Your hunches usually prove accurate because you have already observed a certain pattern in the other person's behavior. For example, think of someone with whom you work every day. You can probably predict how that person would act if he or she were in charge of a project. Your behavior as a leader follows recognizable patterns, too. *What's My Leadership Style?* Provides you with an opportunity to increase your awareness of your own behavior patterns, helping you to understand how your style manifests itself in the way you lead others.

Leadership + Style = Leadership Style

Put leadership and style together, and you get a definition of leadership style: *A person's unique way of influencing others to work toward goals.* Different people have different ways of influencing others. One leader may characteristically influence others to achieve goals by appealing to their sense of fun. Another leader may simply direct others to get down to business. Yet another leader may set out a detailed "road-map" for others to follow, while still another leader may provide encouragement and support as others work toward a goal. Your responses to the items in *What's My Leadership Style?* Reveal your own style of influencing others. Research demonstrates that style can best be understood by measuring the extent to which a person's typical behavior demonstrates *assertiveness* and *expressiveness*. Because we are measuring assertiveness and expressiveness in this assessment, we call these broad categories of behavior dimensions. Assertiveness describes the degree to which a person's behavior is forceful or directive. Highly assertive people like to take control of situations while less assertive people may be more comfortable in less visible roles. Expressiveness describes the degree to which a person's behavior is emotionally responsive or expressive. Highly expressive people like to show their emotions and from interpersonal relationships while less expressive people tend to keep their emotions to themselves. Combining the two dimensions produces four styles.

What's My Leadership Style? Response and Scoring Form

ATTENTION:

There are 4 different shapes that you are entering your answers into.

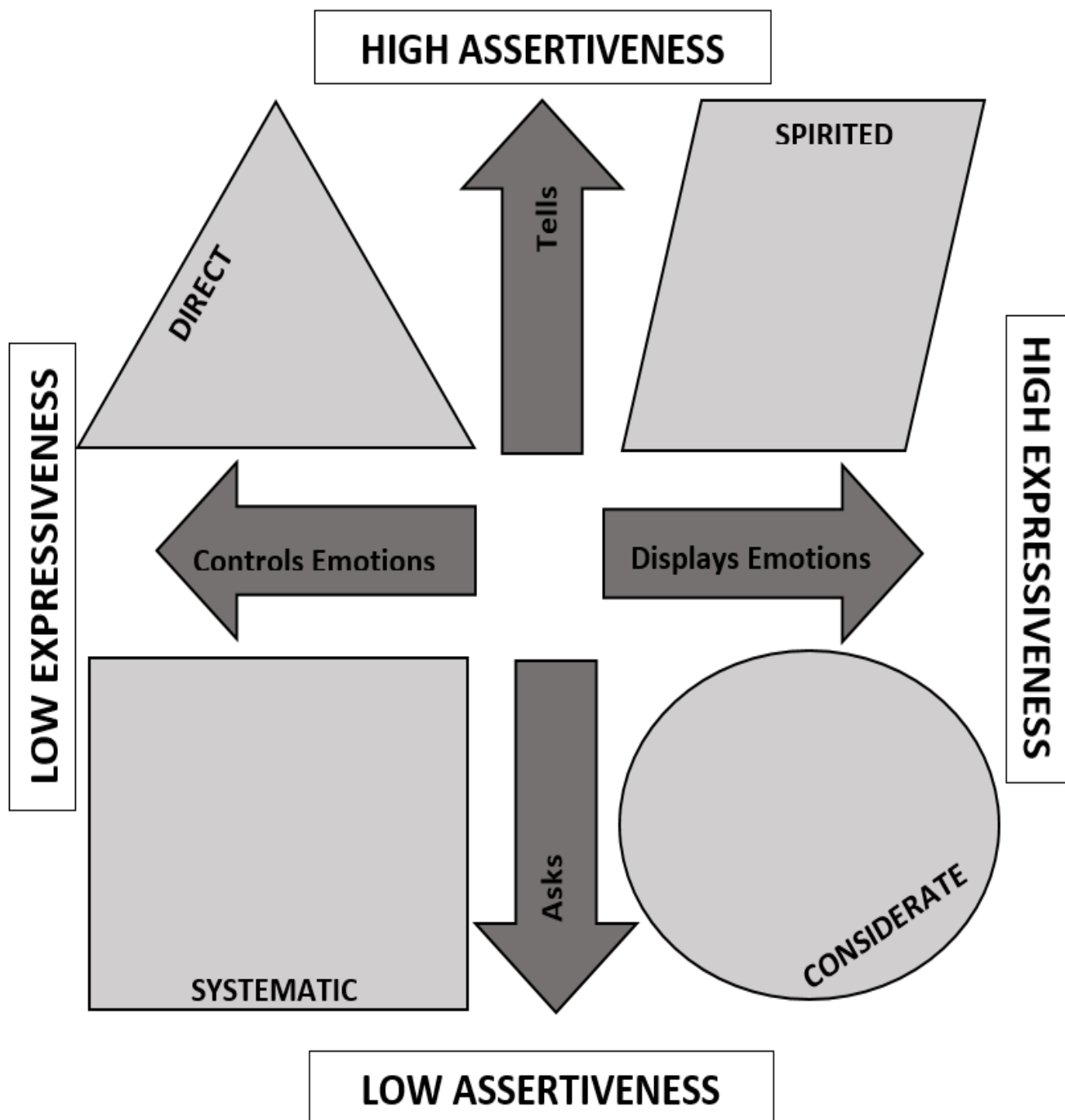
Directions: For each pair of leadership actions below, assign a total of 5 points by dividing the points between both actions. Use any combination that adds up to 5 points, but DO NOT USE FRACTIONS.

When getting others to work towards a goal, and I am under stress, I am likely to...

		Equal to 5			
1.	Generate excitement.			Act decisively.	1.
2.	Take charge.			Offer guidance.	2.
3.	Provide encouragement.			Provide structure.	3.
4.	Point out omissions.			Seek everyone's input.	4.
5.	Emphasize goals.			Outline a sequence of steps.	5.
6.	Promote positive thinking.			Push to beat the competition.	6.
7.	Maintain a comfortable work space.			Get down to business.	7.
8.	Define tasks.			Require speed.	8.
9.	Direct others.			Create a free environment.	9.
10.	Listen to suggestions.			Provide challenges.	10.
11.	Plan things carefully.			Focus on the deadline.	11.
12.	Create a sense of urgency.			Spark creative thinking.	12.
13.	Offer inspiration.			Promote cooperation.	13.
14.	Monitor progress closely.			Improvise along the way.	14.
15.	Adopt a familiar approach.			Brainstorm new approaches.	15.
16.	Make it fun.			Set high standards.	16.
17.	Rally team spirit.			Show appreciation.	17.
18.	Demonstrate enthusiasm.			Analyze the situation first.	18.
19.	Request accuracy.			Foster teamwork.	19.
20.	Promote logical thinking.			Help out.	20.
Totals for Each Style					
Spirited			Direct		
Considerate			Systematic		

What's My Leadership Style? Response and Scoring Form Part 2

Directions: Copy the totals for each style from the previous page into the chart below. This is your leadership style profile.



Interpreting Your Score

Each of the four styles can be described based on the degree of assertiveness or expressiveness used.

Direct	High assertiveness, low expressiveness, leads by taking charge
Spirited	High assertiveness, high expressiveness, leads by inspiring
Considerate	Low assertiveness, high expressiveness, leads by building group harmony
Systematic	Low assertiveness, low expressiveness, leads by planning carefully

People generally develop a leadership style they are most comfortable using. That is their dominant style. Take a look at your Leadership Style Profile. Did you score higher than 16 on any style? If so, you probably prefer to use this style whenever you can. Did you score below 10 on any styles? These are probably leadership styles that you do not use often. Some people have one clearly dominant style. Those people generally use that style to the exclusion of others. Other people may use a variety of styles. They would have a relatively even distribution of points in their Leadership Style Profiles.

Is There a Best Leadership Style?

In a word, no. Current theory suggests that different situations require different leadership styles. In fact, the most important take-away from this assessment is this: *The most effective leaders are the ones who adapt their styles to the requirements of the situation.* Leadership Style Effectiveness shows the strengths and weaknesses of different leadership styles depending on the situation.

Direct • Produces quick results • Gets people moving • Takes charge no matter how challenging MOST EFFECTIVE in crisis situations or rapidly changing situations in which bold action and quick decisions are needed. LESS EFFECTIVE in situations requiring careful planning and in situations requiring tact and sensitivity to other's feelings.	Spirited • Inspires others to develop fresh, new approaches • Create a fun atmosphere by acting spontaneously • Rallies support MOST EFFECTIVE in situations in which people need to be motivated to develop fresh innovative ideas. LESS EFFECTIVE in urgent situations in which deadlines must be met and in situations in which long-term planning is vital.
Systematic • Makes decisions based on facts • Asks for specific details • Is analytical MOST EFFECTIVE in situations calling for careful, long-term planning, accuracy and objective analysis. LESS EFFECTIVE in situations requiring quick decision-making or flexibility because of ambiguity or interpersonal conflict.	Considerate • Listens actively • Works cohesively • Considers others' feelings MOST EFFECTIVE in sensitive situations requiring patience, tact, and diplomacy. LESS EFFECTIVE in situations requiring quick adjustments because of unforeseen changes and situations in which the need to take charge of others is crucial.

Too Much of a Good Thing?

You probably find yourself most comfortable leading others in those situations in which your dominant style is most effective. But sometimes you may need to move outside of your comfort zone so that you can adapt your style to the demands of a particular situation. Otherwise, your leadership style strengths may become weaknesses. Each style has definite strengths. However, some strengths, when taken to an extreme, can become weaknesses.

DIRECT

Direct leaders, when stressed, may cross the line from taking charge to being overbearing.

Direct leaders, like to get things done quickly, which is usually a plus. However, if some of their followers work at a slower pace, they may feel pressured by their direct leader's drive. In addition, direct leader's sensed of urgency may cause them to be reluctant to delegate.

Direct leaders like to compete, which may give their organizations an edge over others. However, taken to extremes, their competitive spirit may intimidate those they lead.

Direct leaders work hard. But when they expect the same high-octane performance from those they lead, they may cause their followers to burn out.

SYSTEMATIC

Systematic leaders provide structure for activities, which usually helps tasks or projects progress without a hitch.

However, when systematic leaders impose too much structure, their followers may chafe under so much control.

Systematic leaders make sure that no one overlooks the important details. But taken to the extreme, their conscientiousness may make the people they lead feel bogged down.

Systematic leaders make sure that all the date is in before making decisions, which is usually a sound policy.

However, when urgent situations call for quick action, systematic leaders' thoroughness may be counterproductive.

Systematic leaders insist on objectivity and accuracy above all else. As a result, those they lead may view them as impersonal or picky.

SPIRITED

Spirited leaders are good at generating enthusiasm among their followers. Yet taken to an extreme, their persuasive abilities may become manipulative.

Spirited leaders know how to prompt those they lead to develop fresh new approaches. However, their emphasis on thinking of new ways to do things sometimes comes at the expense of making sure that things are carried through to completion.

Spirited leaders inspire their followers by providing them with a vision. But in presenting the big picture, they may sometimes gloss over the important details.

Spirited leaders enjoy motivating their followers from center stage, but sometimes they forget that they also need to provide their followers with and audience, by listening to them.

CONSIDERATE

Considerate leaders provide their followers with a sense of reassurance when times are difficult or rapidly changing. However, their desire to keep things comfortable by keeping them the same may cause them to resist change, rather than helping their followers adapt to it.

Considerate leaders build a loyal following by demonstrating their support for others. However, some of their followers may view their support as permissiveness.

Considerate leaders recognize the importance of taking their followers' views into account. But taken to an extreme, their willingness to accommodate others' views may cause them to cave in or appear to cave in.

Considerate leaders are good at maintaining team harmony, but, in some cases, their desire to maintain harmony may cause them to avoid constructive conflict.

The Bottom Line

Current research shows that people representing all four behavioral styles can and do function effectively as leaders. Here is the bottom line: Rather than asking yourself, “Do I have what it takes to be a leader?” it is far more productive to ask yourself, “What does this particular situation require from me?” Then you will be able to decide whether you need to adjust your leadership style, and, if so, how?

Action Planning

Now that you have identified your own leadership style, how can you put it to work? Use the following questions to guide your thinking.

1. Based on the information you obtained from this assessment, what do you view as your personal strengths as a leader?
2. What are your areas for improvement as a leader?
3. Think of a specific situation in which you will need to influence others to accomplish a goal. What strengths can you use to your advantage? How do you plan to adapt your leadership style to meet the requirements of the situations.

Three Sentence Dissertation

1. What is your most important new idea?

2. What will you be able to do now as a result of this training?

3. What do you know you will be able to apply as a result of this training?

4. What do you wish we would have gotten to that we did not?