



Fire Brigades Union

Planning and Organising
Trade Union Education

2010



This handbook "Planning and Organising Trade Union Education – A Guide for Regional Education & Learning Organisers" has been written to provide information, practical guidance and support for those Officials who are involved in developing their Region's trade union education programme.

It will be of assistance to Regional Officials, Regional Education & Learning Organisers and also Officials involved in organising Section Education.

The contents have been prepared with the assistance of the TUC Education Service and colleagues working as tutors on the TUC Education programme.

A further guide has also been prepared for use by Regions entitled – "Regional Courses – Notes for Regional Education & Learning Organisers".

This guide gives a range of examples of the sort of courses that Regions may find useful to include in their plans for the future depending on their current priorities. The guide contains suggested course titles and course aims to help with producing suitable marketing materials for course recruitment.

Head Office has produced programmes and materials for all the courses suggested, for use with TUC tutors who will also arrange for TUC Education/National Open College accreditation for FBU learners. Head Office can also provide advice, guidance and support with contacting the TUC Education Service and suitable TUC tutors if requested.

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Director of Education

1. Introduction

Trade Union education should not be like going back to school: it is based on the belief that we should build on the ideas and experiences of members by working collectively, in small groups, to find solutions to our problems at work and in the Union. People learn by "doing" – not just by sitting still and listening. Therefore we use active methods of learning where everyone is encouraged to take part.

1.1 Aims

Trade Union education should aim to help members and representatives:

- **Build confidence**
- **Develop skills**
- **Understand key trade union issues and arguments**

1.2 Facilitating Discussion

Trade Union tutors will sometimes introduce a topic or session with a formal lecture or presentation, especially where students have no prior knowledge or background. However ***in trade union education the tutor's main role is not that of an "expert"*** primarily present to give out knowledge. On the contrary one of the main jobs is to help and facilitate trade unionists to talk over issues important to them by:

- **Setting the aims of the session and providing activities to work from**
- **Structuring the discussion and ensuring time limits are observed, providing the necessary background information**
- **Setting up small discussion groups and making sure groups do not wander off the point**
- **Encouraging everyone to participate taking the reports from groups**
- **Helping trade union students come to a conclusion and prepare a plan of action for the future**
- **Making sure the aims of the session are met**

There is a need for us to set a friendly and informal tone on courses from the outset. More people will feel able to contribute if the atmosphere is relaxed. We need to get away from the old "schoolroom" style of education that may well have been the last experience of learning most trade unionists have had.

1.3. Facilities

We shall need to arrange for:

- **Room, or rooms – *big enough for groups to work in comfortably***

We should think about the quality of:

- ❖ **Heating**
 - ❖ **Ventilation**
 - ❖ **Lighting**
 - ❖ **Acoustics**
 - ❖ **Cleanliness**
- **Tables and chairs – *make sure there's enough and they are easy to move around***
 - **Waste bins**
 - **Stationery – *pens, paper, felt pens, flip charts, memory sticks etc.***
 - **Useful information – *posters for the wall if appropriate, background resources to help students with problem solving***
 - **Toilets close by**
 - **Crèche and/or childminding facilities**
 - **Refreshments – *if possible, or find out how they can be most easily obtained***
 - **Residential facilities – *special needs, room types etc***
 - **Disability and access issues**
 - **Any special dietary requirements**
 - **Audio-visual equipment – *if you want to show or record a video or film. Make sure the equipment provided matches your DVD player/recorder/camera etc***
 - **Computer resources *if required*: (e.g. access to word-processing or presentation software such as "Word" or "PowerPoint"; access to the Internet and so on.)**
 - **Publicity and Mailing – *to advertise the course in advance***
 - **Smoking arrangements**
 - **Materials to be used – *are they available*:**
 - ❖ **From the FBU?**
 - ❖ **From the TUC/Unionlearn?**
 - ❖ **Will we have to prepare anything ourselves?** (*If so we shall need access to a computer etc. and photo-coping or printing facilities*).

2. Structuring a Session

2.1 The TUC Plan

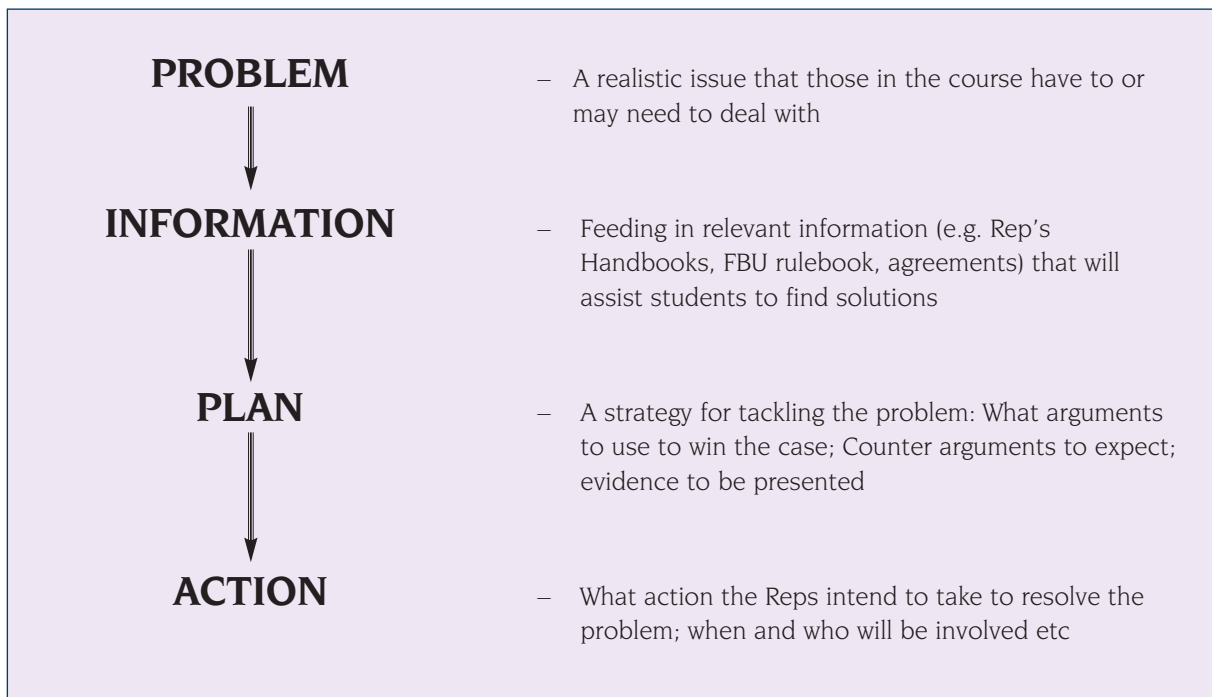
If it is to be useful trade union education must reflect the job experiences and lives of those people taking part. There is no textbook ideal solution to the problems Union representatives and members face. Much of trade union education aims to help them look carefully at their own real life problems and find solutions to them that will be acceptable to both members at work and the union.

Discussion in small groups enables Union representatives to raise problems they come up against and talk them through with others, who will have their own experiences and ideas to offer.

The FBU and TUC build this method into all their courses.

They call it "**P.I.P.**" or "**P.I.P.A.**"

This stands for:

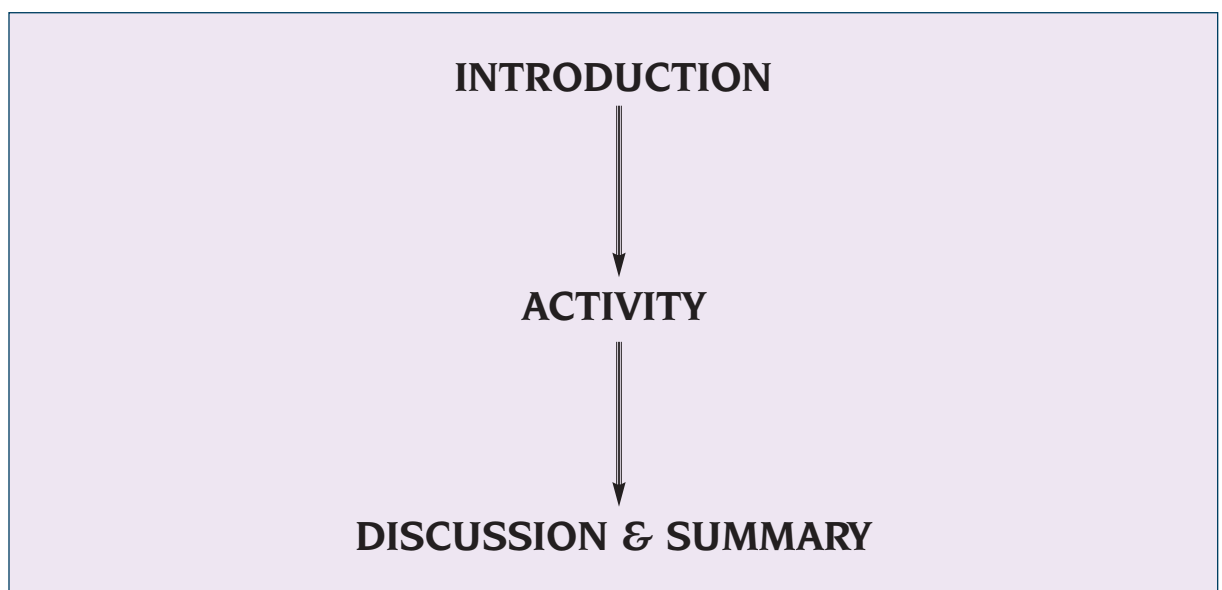


2.2 Learning by Doing

We all learn more easily when we're doing something rather than being told how to do it by someone else. In trade union education this principle is applied through the idea of **Activities**.

The basic structure of any education session centres on the activity itself:

- **How it is introduced**
- **How it is carried out**
- **How the lessons learned are summarised and re-enforced**



This forms the basic framework upon which trade union education is based. On the next page is an outline of these three main parts of an educational session, and some things that should be considered in a session.

2.3 Outline

a) Introduction

- Links** – *How does this session fit in with previous parts of the course, or with the course members' union or workplace experience?*
- Aims** – *What will the participants learn?*
– *How will the activity help them?*
- Task** – *What is the activity?*
– *What materials will be used?*
– *How long will the activity take?*
– *How will people be divided into groups?*

b) Activity

- Group Work** – *Do groups understand the task?*
– *When should you join the groups, when should you leave them alone?*
- Role-Play** – *Do people understand the task?*
– *What role does the tutor play?*

c) Discussion & Summary

- Reports** – *How should groups report the activity?*
- Summary** – *How should key points be summarised?*
- Reinforcement & Consolidation** – *How do these points fit into the rest of the course?*
- Links** – *How does this session lead on to the rest of the course or back into the participants' union or workplace activity?*

3. Planning and Running Sessions

3.1 Planning Sessions

Careful planning is very important. Points we need to think about include:

- **Who is the session aimed at?**
- **What will the session be about?**
- **Where and when will we hold it?**
- **How shall we get people along to it?**
- **What do we want people to get out of the session?**
- **What shall we be asking people to do?**
- **What information and materials will we need?**
- **How much time do we have? How shall we divide it up?**
- **How are we going to structure the discussion to make sure it reaches a useful conclusion?**
- **How shall we divide the group up and who will do what?**

3.2 Running Sessions

a) Getting started:

- Tutors need to explain what the aims of the session are and what we hope people will get out of it
- Briefly introduce ourselves and ask others to do so
- Explain that we want to use the session to make links with people's experiences and problems
- Get people involved in discussions with each other as soon as we can

b) Getting the work set up:

- If we're splitting people into groups we need to think about how to do it and explain why we're doing it
- When we're setting a task, we need to make sure:
 - ❖ *It's manageable in the time*
 - ❖ *It relates to people's experiences*
 - ❖ *It will help them to solve their problems*
 - ❖ *The Task And Timing Are Clear*
- We should not overload people with information
- We need to keep an eye and ear on what's happening in the groups

c) Leading discussions:

- We must think about how to take group reports
- We should try and encourage as many people as possible to join in
- We shouldn't talk too much or dominate: ***remember we're not giving a lecture***, we're primarily there to encourage reps or members to contribute to the discussion
- We can help discussion along by throwing questions back to the group
- If the discussion wanders, help to bring it back to the issue in question

d) Summing up:

- In discussion jot down points we want to pick up
- We shouldn't gloss over differences of opinion
- We need to summarise the points that have been raised
- We can then outline any future action the group have proposed as a result of the session

4. Why we use Small Groups

There are a number of good reasons for using small groups as a way of resolving problems and discussing issues in trade union education.

4.1 Everyone Takes Part

In a group of three or four everybody can play an active part in a discussion. Those who are quiet or reticent will feel less inhibited about contributing their ideas and opinions – it is also easier for a small group to control especially boisterous or domineering people! Finding solutions to problems themselves is not only more interesting than passively listening to a lecture, it is more realistic and helps Reps to gain confidence and improve skills.

4.2 A Better Atmosphere

Working in small groups is a much less formal way of running a session. People can feel more relaxed and are able to chat to each other freely as a way of working through problems. It also helps trade unionists to get away from the idea that education has to be like school.

4.3 Skills are Developed

When small groups are preparing reports to be given to the rest of the class they will need to elect someone to chair their discussion and someone else to take notes. These duties can be shared out so that by the end of a course the majority of course members have had a chance to develop the valuable skills of chairing and note taking.

4.4 Work is Done Collectively

Small groups encourage members to take a co-operative approach to solving problems. They can listen to and learn from the views and ideas of others in relation to an issue: as they should in the 'real world' back at the workplace. Just as important, work can be done at the pace and manner that suits each particular group. Small group work allows for that kind of flexibility.

5. Designing Activities

There are 4 main factors we should bear in mind when we are preparing activities for education sessions:

- **Aims**
- **Information**
- **Groups**
- **Results**

5.1 Aims

Sorting out the aims of an activity will help us to think through what the point of the activity is and what participants will get out of it:

- **How will the activity help our members?**
- **What will members be able to do better as a result?**
- **What will they be clearer about?**
- **Will they develop any skills?**
- **Are the aims written from the participants' point of view?**

5.2 Information

Many of the activities used in trade union education sessions encourage members to learn by finding things out for themselves. To be able to do this they will need a certain amount of information to hand.

Will the information be?

- **Experience or attitudes of members taking part**
- **Newspaper cuttings**
- **Documents and agreements**
- **Union rulebooks and handbooks**
- **Official codes, regulations, statutes. etc.**

In addition the tutor or other person running the session will have to decide:

- **Should everyone have copies to take away?**
- **Will certain information be there only for reference?**
- **Will we ask participants to get information beforehand?**
- **Will members have the skills already to handle the information?**
 - If they do not, we can try and ensure that the activity helps them to develop those skills

5.3 Groups

The way in which people form into small groups to do the activity can influence how effective the activity will be. The aims of small group work include helping course members to:

- **Work through their problems collectively**
- **Create a less formal atmosphere**
- **Allow members to learn from each other's experiences and ideas**
- **Encourage everyone to take part in the discussion: not just a confident few**

Possibilities for dividing members into groups are:

- **From a list drawn up by the session organiser**
- **From self-selection by participants**
- **From grouping by workplace/section/branch**
- **Creating women only groups**
- **Mixing experience, attitudes and background in each group**

Different kinds of activities will require different types of groups to be set up. For instance sometimes it will be sensible for those from the same section to work together, when they are planning what action to carry out in their own section. At other times you will need a mix of people and backgrounds to help group members learn from what has happened in other areas of the union.

Asking each group to elect:

- **A chair**
- **A reporter**

– ensures that new skills are being developed, as well as hopefully making sure the discussion doesn't wander too far from the task set in the activity. If we are running more than one activity then we should ask the groups to elect different members to chair and report on each discussion.

5.4 Results

What will be the immediate results of the activity?

- **Spoken report to the whole group?**
- **Poster display on the wall to refer back to or a presentation using an interactive whiteboard for example?**
- **Leaflet or some written notes that can be circulated to all course members?**
- **Meeting to consider what plans for future action can be made as a result of the activity and group discussions?**

6. Types of Activities

Not all group work is the same. There are different kinds of activity – and they require, and develop different sorts of skills. Deciding on which type of activity to use in a session is important. Below is an outline of the main kinds of activity used in trade union education work:

6.1 Reviewing Experience

Asking participants to report on, or develop lessons from their own experiences.

Skills development:

- **Sharing experience**
- **Reviewing experience critically**

6.2 Attitude Questions

These involve getting people to respond to attitudes or statements, and to explain their responses.

Skills development:

- **Putting arguments**
- **Listening**

6.3 Problem Solving and Planning Action

Participants describe union or workplace problems and then work in small groups on a strategy for solving them.

Skills development:

- **Working collectively**
- **Planning**

6.4 Finding and Using Information

Course members use documents (rulebooks, agreements, management reports and so on) to answer questions set by themselves or the tutor.

Skills development:

- **Finding and using information**

6.5 Finding Things Out

Participants get information about their workplace or union.

This might also involve finding out members' views.

Skills development:

- **Finding information**
- **Interviewing members**

6.6 Role Play

This can include giving a report to a meeting, debating a motion, or talking to members about problems and issues.

Skills development:

- **Giving reports**
- **Taking part in meetings**
- **Putting forward arguments**

6.7 Practising and Developing Skills

All activities develop skills. In some cases this will be the main aim. Examples would be writing a letter, preparing a leaflet, and doing a press release.

7. Language

The aim, of language in any trade union education session is to communicate. The clearer your language is the more effective the communication will be.

7.1 Plain English

Three simple ways of using clear language are:

- **Picking out Key Words**
- **Avoiding Jargon**
- **Asking Questions**

a) Key Words

It is easiest to summarise a discussion, a meeting, and so on, by picking out the key words. Look at the transparencies, flip charts etc used in course report-backs. The most effective make use of a few key words.

b) Jargon

Using jargon means that you are communicating only with people who already understand the jargon.

Jargon can include initials, terms, abbreviations, technical words....

People might not pick up on jargon and ask what it means – they might not want to look stupid. But if they don't **understand** it means that communication has **failed**.

One way of dealing with this problem is to have a "**Jargon sheet**". If a course member uses jargon which someone doesn't understand it gets written on the list – and the course members take it in turn to find out what the term means and write it up on the sheet. This technique makes it easier for people to ask and makes everyone more conscious of using jargon – and of avoiding it!

Always encourage students to pick you up on jargon used as well: this will provide a good way for everyone in the group to learn and will help you to be more careful about the way you express yourself to members and Reps!

c) Asking Questions

The most effective type of question to ask is one based on people's experience. This will stimulate discussion more than a general question and will make members feel less nervous of responding.

7.2 Sensitivity

The language that we use tells other people about our attitudes and the way we view the world.

Trade unions are committed to equality and justice, and this means being sensitive to the ways in which language can be used to put other people down.

Examples of insensitive language can include for example:

- **Racist or sexist jokes**
- **Built-in assumptions ("fireman", "chairman", "headmistress" and so on)**
- **Insults based on disabilities**

In education sessions there will be opportunities to tackle this problem.

8. Jargon

If you are new to training and education you may find some of the terms used unfamiliar or confusing. This note lists the main terms used. Further information on some of these terms is given in other resources and handouts, particularly in "An Introduction to Trade Union Education Methods – Resource Notes".

Action Planning

- An activity designed to encourage participants to continue their learning after the course. It is the main point of trade union education.

Activity

- Something people do during a training or educational event to help them learn. Activities should have **aims**, a clear **task** and develop **skills**, knowledge and/or **attitudes**.

Activity Plan

- Well run training and education events need careful preparation. When planning an **activity** or **session** you should think about:
 - ❖ Who the **session** is for (**target group**)
 - ❖ What the **session** is about (subject)
 - ❖ What you want people to get out of the **session (aims)**
 - ❖ Main points that you want to get across
 - ❖ How to run the **session (method)**
 - ❖ What other **resources** you need (**handouts, activity sheets, visual aids**)

Activity Sheets

- Written instructions for participants that set out the **aims** and the **task**. They can be pre-prepared or written up on a **flip chart**.

Aims

- Every part of union education must have aims – what the participants will achieve by their work. Clear relevant aims make people motivated – your aims should be:
 - ❖ Written down
 - ❖ Clear and simple
 - ❖ From the participant's point of view
 - ❖ Realistic and practical
 - ❖ Build and develop **skills**, knowledge and/or **attitudes**
- Clear aims will help you evaluate the session

Attitudes

- One of the **aims** of union education is to develop attitudes – how people feel about issues about the role of the union, or women in the union.

Checklist

- A list of the main points in clear, simple language. It can be drawn up by the **tutor** in advance or by **participants** as part of an **activity**.

Course

- A complete education or training event, made up of a number of **sessions**.

Evaluation

- This means finding out if a course has been effective. **Participants** should be involved and key questions include:
 - ❖ Was the **course** relevant?
 - ❖ Were the **aims** met?
 - ❖ What will be done as a result?
- It is vital to think about how you will evaluate when you are planning your **session** or **course**. Leave time at the end of a **course** to allow **participants** to think about these issues. Remember that evaluation should also take place during a course – perhaps using a **course meeting** to discuss progress. You may also want to think about further evaluation after the **course** as part of your **follow-up**.

Flip Chart

- A **visual aid** – large sheets of paper on an easel or stand. Using large coloured pens you can prepare flip charts in advance or write on them during a **session**. **Participants** can write their ideas up on them during an **activity** so that other people can see their ideas.

Follow-up

- What happens after the **course**? What will the **participants** do – have they prepared an **action plan**? The **tutor** may be able to offer support and information afterwards. What **evaluation** will be carried out – will there be a report of the **course**? How will **participants** keep in touch? Is there another **course**?

Group work

- Active **methods** work best if people are asked to work in small groups. Large groups make it harder for people to get involved. Individual working can be isolating and competitive, it also undermines co-operation and learning from each other.

Handouts

- **Visual aids** that you prepare in advance and give to **participants**. They usually list the main points, **checklists** or have copies of models used. They can be given out during a **session** so that **participants** can add their own notes or after the **session** as a reminder of what has been said. They can be collected together as resource booklets.

Introductions

- At the start of the **course** or **session** the **tutor** needs to introduce the **participants** to what is going to happen. **Participants** and **tutors** also should introduce themselves to each other.

Jargon

- Those involved in unions and industrial relation use lots of jargon. Be careful about this and encourage **participants** to ask when they don't understand something. Where a jargon or abbreviation is essential make sure that you explain it clearly at the start using words which can be understood easily. It can help to use a jargon board – a **flip chart** or **whiteboard** on which the **tutor** (or **participants**) write down any jargon word the first time it is used and check that everyone understands it.

Learning by doing

- A way to describe active learning methods. **Participants** on courses may have bad memories of school or college and being lectured or told what to do. Learning by doing lets **participants** use the experience, **skills** and knowledge that they already have, to share it with others and to develop further. It is a more interesting way of learning and builds confidence and **self reliance**.

Method

- The type of **activity** used to achieve the **aims** of the **session**. Usually a **session** will use a combination of methods such as discovery work in a small **group** followed by a **report** back and discussion.

Participants

- The people attending the **session** or **course**. The word implies that they are going to be treated as adults and as equal members of the course and that they are expected to join in and contribute.

Pre-course work

- It can be useful to ask **participants** to do things before they come on a **course**. Send them a letter. Examples of things they could do are:
 - ❖ to think about what they want to get from the **course**
 - ❖ talk to members about an issue
 - ❖ get and bring certain documents

Programme

- The plan for the whole **course**. It sets out timings and breaks the **course** down into **sessions**.

Questions

- One of the **tutor's** jobs can be to encourage discussion. This helps people think things through for themselves and reach their own conclusions.

Reports

- After an **activity** you will want groups or individuals to present their ideas to the rest of the group. This can help people develop their **skills** and confidence in talking to groups of people. Make it clear in the **activity sheet** that a reporter is needed.

Resource

- Documents for **participants** to consult during a **course**. These may be real documents such as union rule books or they can be prepared by the tutor as **handouts**. Participants can be asked to bring their own resource materials.

Role Play

- An **activity** where participants act a role – for example a member with a grievance, a union representative and a manager.

Room Layout

- How you set up the room. Rows of chairs emphasise the importance of the **tutor** and make it harder for **participants** to talk to each other. It reminds people of school at tend to lead to a lecturing style. Sitting in a circle or horseshoe makes it easier for people to get involved, encourages discussion and democracy. It is more relaxed to sit without a table and it can encourage participation, however it is difficult for people to deal with papers or write notes. Be prepared to change the layout as needed.

Self reliance

- An important **aim** of all trade union education. It is about helping **participants** feel more confident and be prepared to take action. It is important to choose **methods** which are active, build confidence and develop **skills**.

Session

- One part of a **course**. It has its own **aims** and **activity plan**. Sessions vary in length according to the needs of the activity and the time available. A one day course might have four sessions of up to two hours each. An after work discussion might only be 30 minutes.

Skills

- A vital part of union education is developing the skills that people need. Active **methods** mean that you can develop skills such as giving reports, taking written notes or understand and analyse written material at the same time as you cover a knowledge area – for example by getting **participants** to write letters, give reports or discuss real issues. Whenever you are writing the **aims** for a **session** think about the skills that might also be developed as well as the straightforward content of the **task**.

Study circles

- A group of members who study and learn together. Study circle leaders should receive some training and assistance with materials. However the main point is a group of people actively and informally working together. It is a method which is cheap to run, doesn't need experts, can be used anywhere in the country and can reach a large number of people.

Summary

- A **tutor** or discussion leader should help end a session by summarising and drawing conclusions. The main points can be listed on **flip chart** or produced later as a **handout**. It is about reinforcing the learning, linking to other parts of the **course** and emphasising the action to be taken.

Target group

- The people the **course** or **session** is aimed at. You need to be clear about the target group so that you can decide on appropriate subjects, the level at which to pitch the session and how to publicise it.

Task

- Active learning means people working together – learning by doing without the **tutor's** participation. To do this effectively they must be set a task. It should be:
 - ❖ Clear and written down
 - ❖ Relevant to the **participants** and the **aims** of the **session**
 - ❖ Manageable in terms of time available
 - ❖ Encourage the development of **skills**, knowledge and **attitude**.

Team teaching

- Means two or more **tutors** working together. This can be very positive but they need to prepare carefully and agree how to divide the work. It can also be called co-tutoring.

Tutor

- The person leading the **session** or **course**. Some trade unionists prefer the term discussion leader or **study circle** leader when talking about rank and file union educators. Increasingly the term trainer may also be used.

Visiting speaker

- Someone invited to a course to cover a specific subject – usually because they have expert knowledge or experience.

Visual aids

- Anything which helps you present ideas visually. Visual aids can really help participants learn and remember. Examples that a tutor might use include:
 - ❖ *Whiteboard*
Easier to write on (but you must use the right pens) and read. Usually fixed to a wall and immobile. Colour pens can enhance interest.
 - ❖ *Data projector*
Can be transported or may be available at the location. Useful for presentations using "PowerPoint" generally in conjunction with a computer.
 - ❖ *Interactive boards*
Recent addition to some classrooms. There are several standards but all are usually compatible with electronic files and resources. Some may be linked to the internet. Can be very useful if tutors have been trained to use the model/standard available and students can find them relatively easy to use due to their "intuitive" interface if they are already "computer literate". Even better when linked to multimedia facilities and fast printer.
 - ❖ *Blackboard*
Sometimes difficult to write on and to read. Rarely found or used these days.
 - ❖ *Flip chart*
Can be transported and moved around in a room. Can be prepared in advance or written at the time. Sheets can be kept as a permanent record. Some versions available for table top work.
 - ❖ *OHP*
Overhead projectors. Can be transported or may be available at the location. Useful for pre-prepared diagrams etc. Regarded as old fashioned now.
 - ❖ *Videos*
Can create interest and variety, need appropriate equipment.

9. Role Play

Introduction

What is role play?

Role play is a training term with which we are all familiar. However, what actually happens on a training course can vary considerably. It could involve participants "acting out" a script in front of an audience, it might be a lengthy simulation with lots of participants playing prescribed "roles", or it could be a short exercise between two and three people in which they effectively play "themselves" in a given situation.

We all play a wide variety of roles in our everyday life. One minute you are a parent dropping the kids off at school, then you are on your way to work as a passenger, driver or pedestrian. At a branch meeting you are union activist. You get used to switching between these different roles. However, on a training course we may be asking people to play an unfamiliar role, or to do it in front of other people and we will be analysing their "performance". Consequently just mentioning the words "role play" can set up widely ranging images and reaction in people.

Why use role play in training?

Role play involves the participants in much more participative way than many other forms of training. It is a lively and stimulating activity that can provide variety on a course. The experiential nature of role play can be effective in achieving "I do and I understand", and can give practice in applying learning. It can help build the confidence of participants by allowing them to practice handling different situations in a safe and non-threatening environment.

Role play can be used to develop knowledge, skills and attitudes either separately or in combination. Knowledge can be developed by using a role play to apply what has been learnt in a simulated environment – perhaps showing knowledge of disciplinary and grievance procedures by the way a meeting with a member is handled. A wide range of skills can be developed by role play – such as problem solving, interpersonal skills, leadership, running meetings, communication skills, negotiations and interviews. Attitudinal issues like assertiveness and confidence building can also be tackled.

Role play has a wide range of possible applications and, handled effectively on a course, it can enhance learning considerably. However, there are potential disadvantages to the use of role play. Making sure that the disadvantages do not outweigh the advantages is therefore important. Using role play effectively involves preparation, handling the activity and drawing lessons from the activity.

Preparation of role plays

Aim

The key element in preparation is being clear about the learning aims. You should think about the knowledge, skills and/or attitudes you want the role play to develop as this will influence all further decisions about what you do. Make a note of the issues you want to cover, this will help you develop and run your role play.

Timing

A role play can be used during the early stages of a course to examine the pre-existing level of knowledge, skill or attitude. The main, potential, pitfall with this approach is that, if the role play does not go well, participants feel they have been "set up" to fail. It is important to examine what you want to achieve by using role play in this way. There are other, less threatening, ways of checking learning levels. People who come voluntarily to a course may legitimately say that they thought the purpose of the course was to learn new knowledge and skill rather than to have their lack of it shown up. However if you have participants who are unaware of their training need it may be a useful approach. Nevertheless care needs to be taken to ensure a supportive and trusting atmosphere is created and that feedback is managed with care.

More usually role play is about practising something after participants have been provided with appropriate background information or theoretical understanding. The need to either provide background information and build trust levels usually means that role play do not feature in the early stages of a course.

Another aspect of timing that you may need to consider in your planning is the fact that role play is active and stimulating and can be a good antidote to less lively sessions. However role plays (even short ones) can take a lot of time when you include the briefing and preparation, the activity itself and the time for drawing the lessons from it.

Another aspect to consider is the time and space that might be needed for "de-rolling". If the role play has probed high emotional levels, it may be necessary to set aside time for people to talk about what happened (separately from talking about the learning). This might be on a one-to-one basis with you or someone else who can take on a "counselling" role. It may mean that groups or individuals need to come to terms with things that happened (particularly disagreements) so that the rest of the course is not affected.

Therefore you might need to think about the time of day that you do the role play and what the subsequent activities are going to be. For instance if the course is residential then it may be appropriate to do the role play as the last activity, the evening can be a time for dealing with any de-rolling issues. On the other hand on a non-residential course it may not be a good idea to let people go home without having resolved outstanding issues. There are no hard and fast rules over this – but you need to consider the possibilities when you are planning your programme.

Preparing materials and resources

Materials prepared for briefing in role plays should be clear, concise and readable. The more detail in the role, the more time people will need for preparation. The closer you can make the scene to something that is familiar, the less scene setting you will have to do. Very detailed briefs take a lot of work to prepare; they leave less room for manoeuvre for the participants (which may restrict their learning). They tend to expect the participants to "act" as someone else, which some participants may find difficult. If things go wrong it will be seen to be the fault of the brief rather than the participants.

Briefs with fewer details may also be criticised by participants as not having provided enough detail. Some people may find it easier to try to work out for themselves how their "role" is likely to behave; others prefer a lot of direction.

The more complex the situation and the more people that are involved, and the greater the "role shift" the more detailed you will need to make the briefing materials.

Less complex situations are often best dealt with by only providing background details and leaving participants to create their own personal briefing. As previously described, you may even be able to use a role play that is self created by the participants.

Handling role plays

In handling role plays you need to think about how you decide who should play which roles, the role of the observers, how you set the situation up and what your role is while the role play is in progress.

Deciding who should play which role

Different types of role play involve different degrees of change of role by participants. Large shifts in role can be difficult for people to handle. While detailed briefing can help, you will need to consider this carefully when deciding on how to allocate roles. There are a number of ways of allocating roles to people. You will need to revisit your aims to help you decide which one to use. The first choice to make is whether roles can be allocated randomly or whether they should be assigned.

Random allocation

This can be done by asking people to volunteer (either knowing what the role is to be or blind) or by allocating roles randomly yourself. If you are using a small parallel group role play and there is to be a switching of roles this can be a helpful method. Volunteers are more likely to be comfortable with what they are doing and can help the more anxious course members settle in to the routine.

Assigning people

There are basically three choices – assigning people to roles that they are likely to have to play, assigning them to the direct opposite role and assigning them to another role that is required for the purposes of the role play but is neither one they will play nor the opposite.

If you are assigning people to the role they are likely to have to play you will need to consider their current levels of experience, and again your choice may depend on the aim of the exercise. For instance in a role play of a meeting you may wish to assign the role of the Chair to someone who is experienced in this role because it is more important that the meeting is well chaired than it is that someone gets a new experience of chairing a meeting.

Often your aim will be to give people a new experience. However a large group, even in the safety of a course, can seem a daunting place to try something. Some people even say that it is more nerve-racking doing something for the first time in a simulation than for real, possibly because they know that their performance is going to be analysed.

Assigning people to the opposite role can be a useful way of learning by having to switch perspectives. As already described, this can be useful in large group role plays. It is also a useful technique for short role plays on interpersonal skills such as assertiveness. You can ask participants to give examples of real situations that they have found themselves in, such as delaying with a complaint. They provide the background details, and then they play the complainer in the role play while someone else plays "them". This can help in finding out about different ways of dealing with situations. It is a very flexible technique that involves least preparation for the trainer but is very specifically helpful to participants.

Assigning people to other roles means that everyone can be involved. It can be difficult to play a role with which someone is unfamiliar, if the role is fundamental to the role play there is a risk that the whole thing will be undermined if it is ineffectively played. This may be a time to play the role yourself or bring in an outsider. If the role is peripheral there is the risk of boredom, inattention or sabotage, all of which will damage the learning potential.

Observers

An often neglected role is that of observers. They are vital to the final part of the role play – drawing lessons. However, in preparation you need to think carefully about how you are going to use them. It is as valid a role as active participation and people can learn as much as they do from the active participation. It is important that observers are thoroughly briefed about what they are to be looking for. They may need extra theoretical input on areas such as non verbal communication or questioning techniques if it is vital that you can draw out information on these things. They may also need assistance in techniques of giving constructive feedback. If the active participants need time to brief and prepare themselves you can use this time productively with the observers.

Participants who are experienced in a particular role (such as chairing a meeting) can be helpful in observing the performance of that role.

Setting the scene

Some people find role plays very anxiety provoking, others approach them with relish. Perhaps the majority of people appreciate their usefulness and are happy to participate even though they find them difficult or embarrassing. As the trainer you need to take all of this into account.

If the course is to use a major role play – such as a large group exercise, which is central to the whole course, then it is probably a good idea to let people know in advance that this is the case. If you intend to use video as a means of providing feedback (more about this later) then it may be even more important to warn people in advance.

For smaller role play it may not be necessary to specifically draw people's attention to it in advance, but it is usually a good idea to give some warning at the start of the course. This means that anyone who would find it particularly difficult has the chance to talk to you in advance, giving you the opportunity to either reassure them or find ways in which they can still productively participate. It is difficult to do this at the point where you are setting the role play in motion.

Setting the scene is an important aspect of the role play. As well as giving out any briefing materials you may also want to give an outline of the whole scenario, give details of the timetable and discuss how the feedback and learning are going to be reviewed. You should discuss the aims of the role play with the participants so they know why they are doing the activity and what they will get out of it. Being clear about aims can help participants avoid the temptation to get over involved in amateur dramatics or to try and "set up" people or try to catch them out. It is important to keep their minds on the learning.

While people are preparing themselves, you will need to be available to answer questions and to deal with any problems that they have.

Your role during the activity

What you actually do while the role play is in progress may vary considerably according to the situation. As previously described you may be an active participant, in which case you must make sure that you are fully prepared. If you are participating, you are unlikely to be able to take notes for feedback and review; this may mean that you have to place a greater emphasis on the reliability of observers. Another way of achieving this is to video the role play.

Another way of playing an active part is to play the role of an expert to whom participants can come to for advice (usually during breaks in the role play). This can help with the reality for situations where participants have to work out for themselves what information they need. It can also make sure that the role play does not founder because participants do not know what to do next, particularly in an opposing group role play. A potential disadvantage is that one group may (rightly or wrongly) perceive that inappropriate help was given to one side, or that you passed on information to the other group that was confidential.

If you are not participating, you may find that you are operating the video equipment. This may also make it difficult to take notes but because of the video this may be less important.

Otherwise your role is likely to be that of an observer. If you are using small parallel groups, you will not be able to observe all of them all of the time. You may need to decide between spending the whole time with one group (perhaps in rotation if they are to repeat the role plays) or to rove between groups. If you are roving, you will probably only be able to give general feedback, although sometimes it is easier to observe body language from a distance.

There may be some difficulties for you as a trainer in monitoring what is happening. The role of observers may be particularly important and they should be carefully briefed (more about observers later). With a lot of groups acting separately it can be difficult to make sure that times are kept to and that you do not have some people hanging around while others finish off. The observers can have an important function in keeping time, but you may have to

consider what the effect of just stopping the role play rather than letting it come to a natural end may be for de-rolling or just frustration levels.

Drawing lessons

As important as the experience of the role play is the way in which the lessons are drawn from the experience. This can involve de-rolling, reflection on what has happened and processing the information. Every role play session must allow ample time for a review.

De-rolling

This has already been mentioned in the context of timing. It can be vital to allow time for this to happen. Until people have had the chance to come out of role properly, they may be in no position to start learning from the experience. The activity may have been fun or stressful, little will have been learnt until the participants have the opportunity to sit back and examine critically what happened.

Reflection on what has happened

This may be part of de-rolling. It is important to look back over what happened and also to move on to analysing the processes that were involved. Exactly what you are looking for in this analysis will depend on the original aims of the exercise.

It is important that the observers were properly briefed on what to look for so that they can provide the information for this analysis. They can then be asked to provide details on what was good and what needs development. However participants should also be encouraged to comment on what happened and how they felt at various stages. For instance it may be important for the participant who played the member in a role play on recruitment to explain that while they agreed to join the union they felt they had been forced into it. The outcome may have appeared successful but the feedback will show that in the end it was possibly ineffective. Your role as the trainer is to facilitate this process, this may mean encouraging people to both speak up and to listen. You have the job of creating and maintaining an atmosphere in which criticism is made constructively and received positively.

Processing the information

For learning to take place this information needs to be processed. This will happen as part of the sharing of perceptions. It can be helpful to try to draw generalisations from the specifics of the role play. One way of doing this is to compile a list of dos and don'ts. Another method is to ask people to prepare action plans about how they will prepare for the real thing.

Conclusion

Role Plays are a useful and effective training method. However, they need careful preparation and handling. It is also important to remember that the enjoyment of the activity should not take precedence over achieving the aim of the learning.

Good luck!

10. Evaluation

What is Evaluation?

Evaluation is the process of finding out whether the course has achieved its aims and objectives. It consists of collecting information and assessing that information. Once the information has been assessed improvements can be made to future courses to improve them or the aims and objectives can be reassessed.

What information do you need?

- **aims** How will you know whether the aims you set out in advance have been met? When you are designing the session or course you need to think about the ways in which you can collect information to assess whether they have been met.
- **methods** Were the methods used appropriate? Did they help or hinder in the achievement of the aims? Were they appropriate to the experience/knowledge of the participants?
- **content** Were all the appropriate areas covered on a course? Should some be left out? Should other areas be included?
- **timing and pace** Were the times given to each area appropriate? Should some sections be shortened or lengthened? Did the course go too fast or too slow?
- **changes** Would the participants like to see any other changes?
- **action** What will the participants do as a result of the course?
- **facilities** Were there any problems with resources, accommodation or refreshments?

How can you evaluate?

Evaluation can take place:

- **During the course**
- **At the end of the course**
- **After the course**

During the course

You can have a formal evaluation session at the end of each activity or day. For example you can check whether the aims of the session were achieved, discuss what has been done and what will be done next. You can review what has been learnt at the end of each day or review the previous day at the start of the next day.

You can informally monitor what the students are doing through observation and discussion. For instance the quality of a presentation or report back can provide information on how well something has been understood and how effective the methods used have been. Comments, questions and answers in a discussion can provide similar information. What is done in a role play might show whether they have understood what is required.

It can be important to recognise the value of this informal evaluation and to make notes during a course. This information can be added to any other information collected at the end or after the course.

At the end of a course.

You can have a formal evaluation by:

- **Asking participants to fill in a questionnaire**
- **Having a structured discussion around key questions**
- **Running a group activity**
- **An action planning session**

In each case you need to think carefully about the questions you need to ask to get the appropriate feedback. At the end of the course participants are often tired and thinking about going back to work or home (especially after a residential course). They may also be tired.

Questionnaires given out at the end of a course may not be given much thought as they are completed. If participants take them away so that they can give more time to thinking about feedback they are often not returned. Questions which ask participants to give ratings on a scale can provide information which is easily analysed but it will be lacking in the more qualitative assessments. Useful information can be obtained by asking for comments but (due to the reasons above) this may be limited. Questionnaires are a good way of getting feedback from everyone on the course (even the quiet ones who have not said much in discussions), you will need to think about whether to make them anonymous or attributable. Anonymous questionnaires can help people feel more comfortable about making comments; attributable questionnaires can be followed up if you need further information. You may have to use an organisational evaluation/assessment form. For your particular course/session you need to decide whether this is going to provide you with appropriate information. Particularly when a course is new you may want to supplement this with additional sources of information.

A structured discussion can be helpful in helping you find out whether you have achieved your aims. Leave enough time for the discussion so that it is not rushed. Make sure that you are able to make notes about the comments made. Some participants may feel uncomfortable about giving negative feedback to the tutor who has been running the course. You may need to set the scene, explain why you are doing it and what sort of information would be helpful. You have to be prepared to hear things that you may not like – it is important that you do not react negatively to what you hear. Sometimes it can be helpful to ask a colleague who has not been involved in running the course to take this session. This can make people feel more comfortable about giving feedback.

Structured discussions and questionnaires are ways in which you can ensure that individuals all have a say.

A small group activity may provide a deeper level of assessment – as the group helps itself think through what to say – but individuals who have alternative viewpoints may not have their say.

Action plans completed by participants at the end of the course can also provide information about how well aims have been met. You can ask participants to share with everyone what they have learnt and will do or you can collect copies of their action plans. However you may get a very optimistic view of what they are going to do in the real world.

After the course

The final test of whether the aims of a course have been met will be whether anything is done by the participants as a result of the course. You can formally evaluate this by:

- **Sending out a questionnaire after the course**
- **Phoning participants and asking what they have done as a result of the course**
- **Carrying out a survey of past students**
- **Asking participants to report back on their action plans**
- **Discussing the effect with the people responsible for sending people on the course**

More informally you can talk to participants when they return on later courses, you can monitor whether further people are sent on the same course.

Questionnaires and surveys do not tend to have a very high return rate. You will tend to get comments from those who have something they feel particularly strongly about (positive or negative). Phoning participants to ask the questions can provide a better return rate, but, like an end of course discussion, they may not want to make critical comments.

A difficulty with post course evaluation information is that it can be difficult to make sure that any changes are actually as a result of the course or whether other external influences prevent participants from being able to do as much as they would like. For instance, for participants on a recruitment course you might find out how many people they have recruited since the course – however this may be affected by a whole range of other factors.

What should you do with the information?

You need to use the information carefully. Be sure that you have got an accurate and general view of the course. One piece of critical information does not mean that the whole course has to be changed, weigh it against all the other information from as many sources as possible. Look for trends and repeated comments. Use your experience of previous courses. Consider whether there was something particular about one course which caused adverse comments (sometimes dissatisfaction with accommodation or food can be transferred to the course content, one activity which doesn't work well can make participants feel dissatisfied with other parts of the course).

Do not collect so much information that you become bogged down in analysis, but make sure that you collect enough information on a regular basis and carry out the analysis.