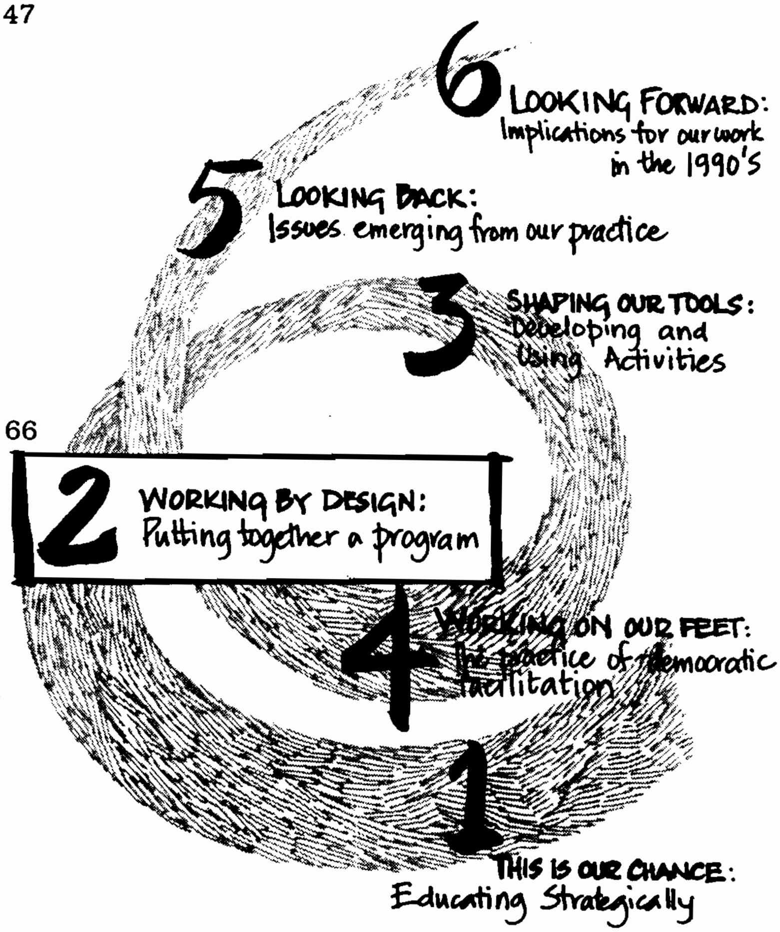
Rick Arnold, et. al.,
Educating for Change
(Ontario: Between the Lines, 2002): 31-67

2

Working by Design
Putting Together a Program



An educator from Ontario accepts an invitation to lead a bilingual workshop in Quebec with participants from all over Canada representing a range of sectors and issues. The workshop, within a larger conference, is to move towards recommendations for future coalition work.

As the educator begins to think about the session, her "nightmare" takes shape. She arrives at the session and tries to introduce the program and objectives in both languages. Irate, the Québécois participants demand a new facilitator who speaks good French. Somehow she struggles on, but as they finish the morning's work, a prominent male trade union leader in the group confronts her: "This is a waste of time – all this 'popular education' nonsense. I've had it!" He walks out, joined by most of the participants.

It isn't surprising that this work gives us nightmares. As social change educators, we care passionately about what we do. But often we don't take ourselves seriously enough. We forget that our work is a craft, and that it is a risky one, with extremely high stakes.

We're on the front line, dealing with people's dreams, fears, and sometimes their livelihoods. That makes it all the more important to tackle our "nightmares" in advance, through planning and design.

TAKING OURSELVES SERIOUSLY

The politics and economics of planning

Planning and design can help our educator deal with the nightmare in Quebec before it has a chance to happen. She takes some French lessons to brush up her language skills. When they design the workshop, she and her co-facilitator build in time during the workshop agenda to share their expectations with the participants and to have ongoing critical reflection on the process. If they get critical feedback during the sessions they can stop and redesign what's happening to fit the need.

Often, the organizations we work for don't place much importance on this part of our craft, and advance planning is minimized by educators themselves. The same person who spends a good deal of time carefully planning a three-hour speech will walk into a discussion with little or no prior planning, to "sit and rap". There is a clear political position embedded in this behaviour. It suggests that the words of the person delivering the speech are more important than the many voices in the discussion.

A major problem with planning and design is that it is hidden work. This creates an economic problem where educators within organizations are not given sufficient time to plan, and outsiders are almost never paid for all of the time they put into the design of an event. The result for the educators is overload. With too many sessions and other competing interests, planning becomes a luxury we aren't sure we can afford.

It's also important to spell out the workshop design on paper, and provide this as a handout to participants at the meeting, probably at or towards the end. This technique, of making sure workshop participants see process as something constructed, is another element that helps us take control of our own learning.

Those of us committed to democratic education practice cannot afford not to spend the necessary time planning and designing our work.

Why we spend time planning:
- to show respect for people
- to ensure better use of time and resources
- to avoid the temptation to talk at people
- to begin to deal with our nightmares
- to help ensure control of the process by participants
- to ensure co-ordination with co-facilitators
- to build participant interests and concerns into the program
- to structure activities that maximize participation
- to build in optional activities that can be used to redesign the program or agenda during the session itself.

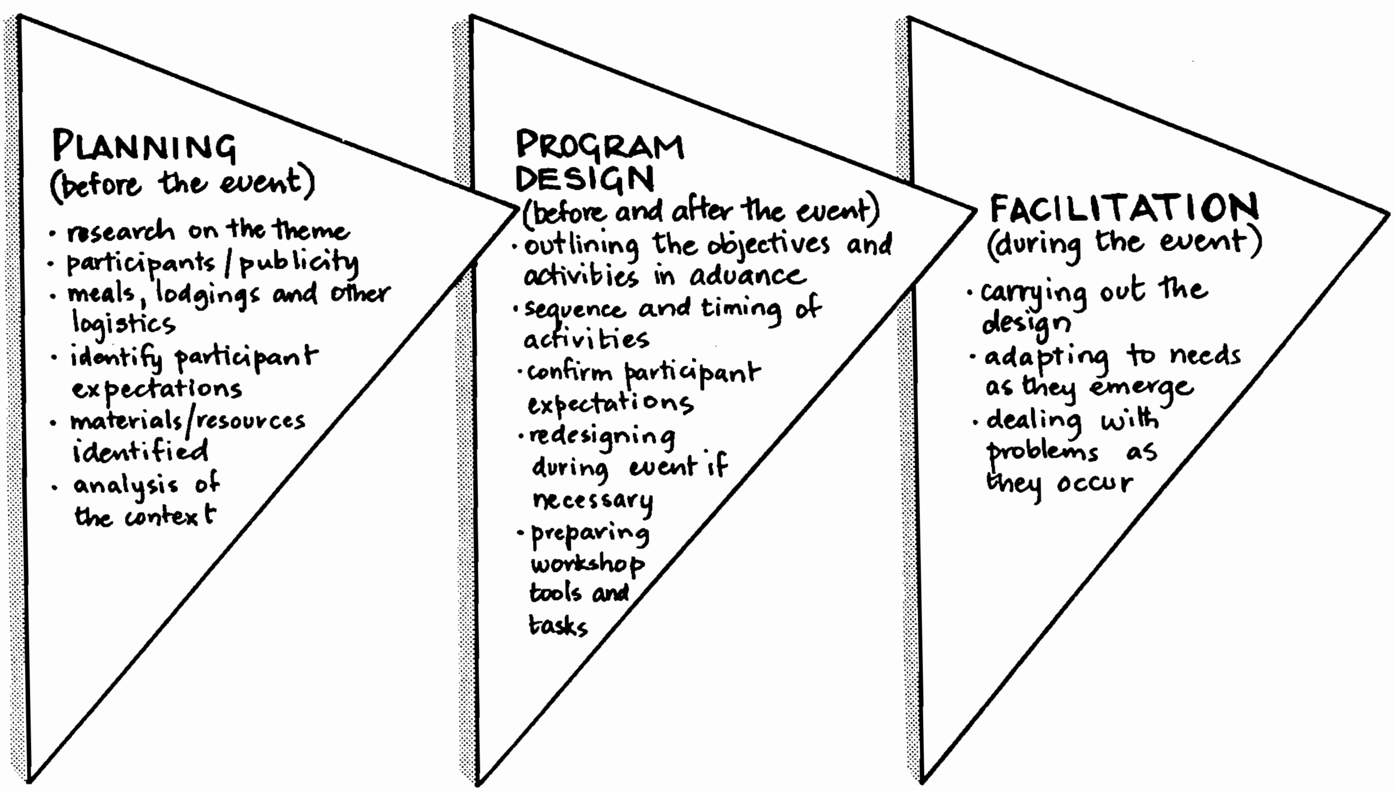
And here's why we provide a written description of the workshop design:
- to make the process of the event visible to the participants
- to share our ideas and experiences with other educators
- to help evaluate the plan afterwards
- to have material for use in future programs.

A note on planning, design, and facilitation

Let's look again at how our educator tried to deal with her nightmare. Among other things, she took French lessons as part of the planning, before the workshop. In designing the workshop, she included time for the participants to stop and critically reflect on what was happening. (Later, when she did critical feedback at the end of the first morning, she was able to take time during the lunch break to redesign the rest of the workshop to meet the needs of the participants. All of this helped her to work on her feet during the actual facilitation of the session.

After a course on democratic educational practice with the African National Congress (ANC) in Lusaka, Zambia, workshop participants helped us come up with a graphic to illustrate the different aspects of planning, design, and facilitation:

What do we mean by planning, design, and facilitation?



The planning phase

You arrive at the room to be used for your workshop only to discover that the room is locked. When you locate the janitor with the key you discover that the room has only one outlet and you need an extension cord. The slide-tape program is key to your design so you take the time to find the janitor again – and begin late. Part of the way through the showing, the projector bulb burns out, and you have no spare.

Or: you get to a workshop and find out only too late that small juice packs and styrofoam cups are the only containers available, which means trouble because these containers are not environmentally acceptable.

Sound familiar? In these situations, the educators hadn't looked at the room in advance, checked the equipment, or considered how the refreshments would work. And it always seems that what we forget to do in the planning phase comes back to haunt us during the event itself. Based on our own past nightmares, here are a few things we think about before the event, in the planning phase.

A planning checklist

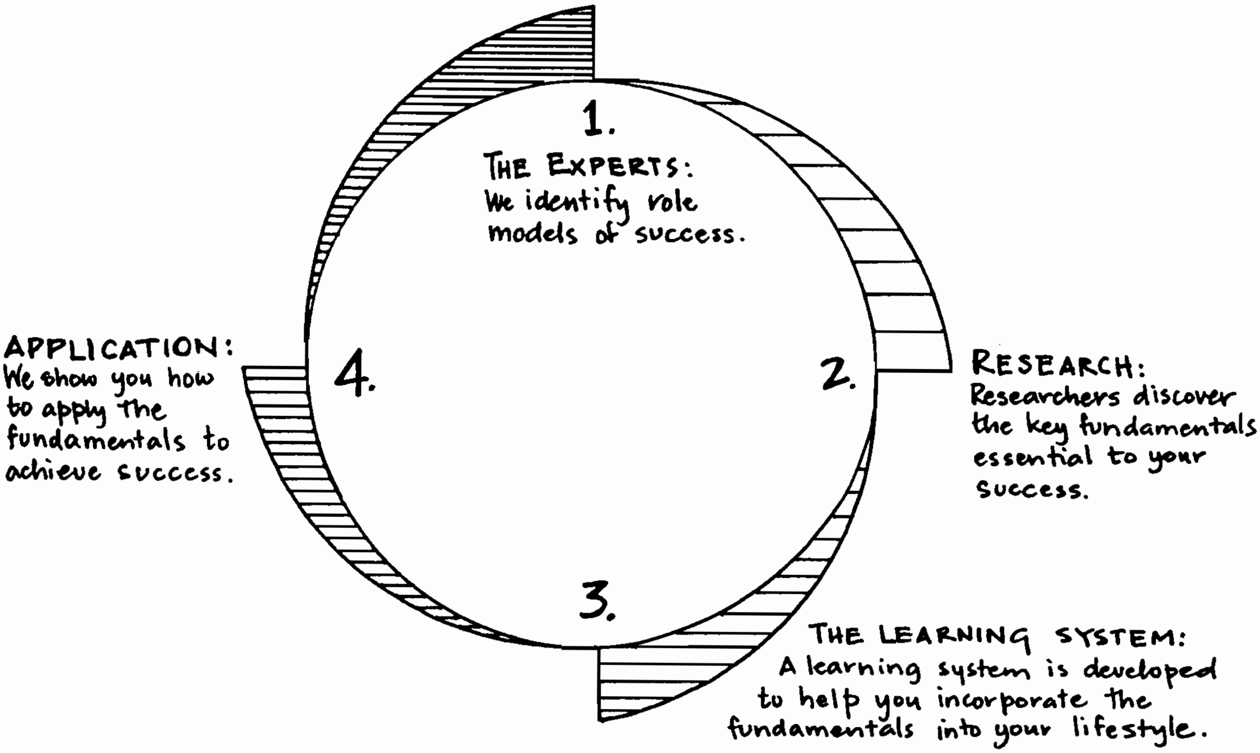
In the checklist we're leaving a space under each item so you can add other points.

Participants	■ participants selected ■ advance information to participants on program/ logistics ■ advance information from participants on expectations ■ information about participants and their expectations ■
Context	■ sponsoring organization(s) identified ■ advance information on sponsoring organization(s) ■
Resources	■ funding secured ■
Logistics	■ book place, equipment, audio-visuals ■ organize meals, coffee/juice breaks (keeping the environmental factors in mind) ■ purchase supplies such as flip-chart paper, non-toxic marker pens ■ check room(s) in advance for: ❑ outlets and curtains for A.V. equipment ❑ space for large- and small-group work ❑ wall space for posting flip-chart paper, chairs, tables ❑ ways to adjust heat, light, ventilation ■
Materials	■ photocopy handouts, tasksheets ■ organize booktable/displays ■
Documentation	■ decide how to document event ■ get the equipment/supplies required for documentation ■

The design phase: the model matters

What we understand by "education" is reflected in how we carry out our work. To illustrate this point, we're going to take a look at two models.

One of us "researched" the first model while flying back to Canada from work in another country. He was amazed to find a proposed system for designing learning experiences amongst the glossy literature on the airplane.* He found an ad for what's known as the "banking" model of education, a part of the conservative-technocratic stream of education. The model looked like this.



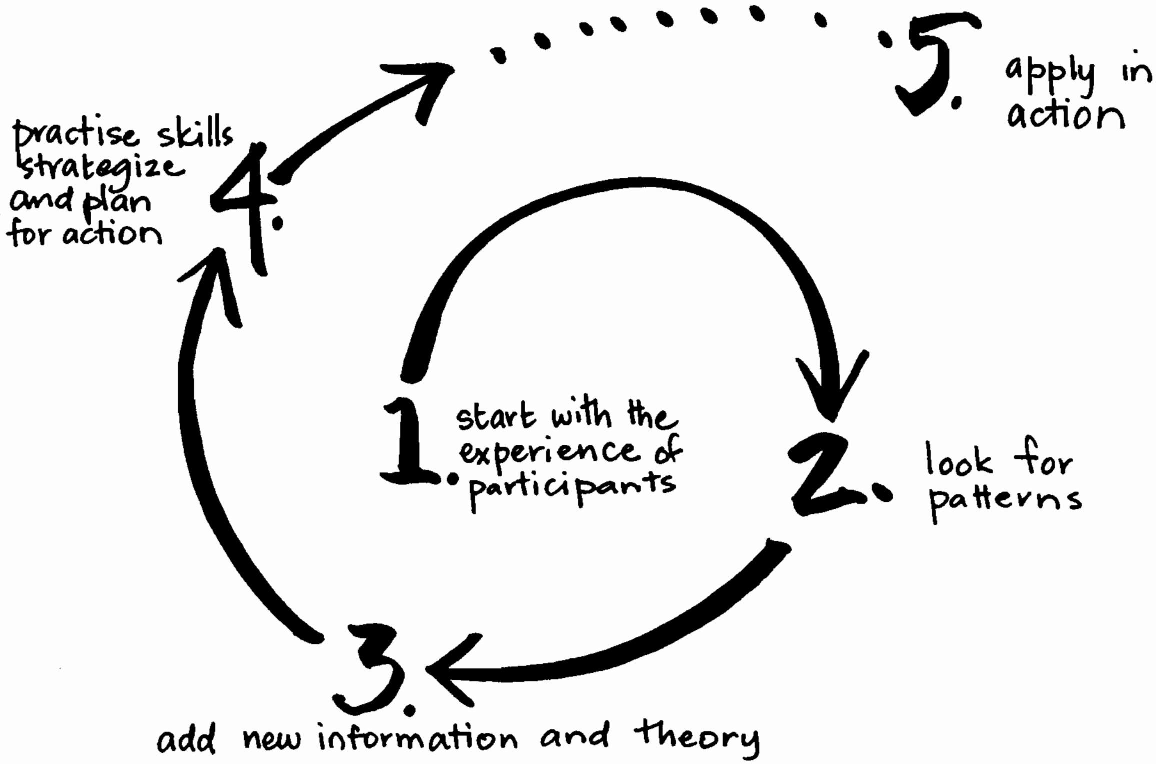
This model suggests that:

1. learning begins with the experts, who are our role models;
2. teachers have the information consumers need to succeed;
3. success means conforming to the role model, which means becoming like the experts; in other words, supporting the status quo.

* American Airlines, "Sybervision", ad on inside cover, Winter 1990. For a model within the "liberal" stream, see J. William Pfeiffer, ed., *A Handbook of Structured Experiences for Human Relations Training*, Vol. IX (California: University Associates, 1983), especially the Introduction, pp.1-3.

In planning for a workshop together, three of us pooled our own best attempts at design models. We came up with one we call "the spiral model", which we now use in our work.

The spiral model



This model suggests that:

1. learning begins with the experience or knowledge of participants;
2. after participants have shared their experience, they look for patterns or analyse that experience (what are the commonalities and what are the differences?);
3. to avoid being limited by the knowledge and experience of people in the room, we also collectively add or create new information or theory;
4. participants need to try on what they've learned: to practise new skills, to make strategies and plan for action;
5. afterwards, back in their organizations and daily work, participants apply in action what they've learned in the workshop.

An extension of this model is that later participants return to share the experience for further assessment and critique, and perhaps work to revise the strategies – moving through the cycle again.

What happens when we compare the assumptions in the spiral model with those in the expert model?

- ✧ The spiral model values not only the knowledge and experience of the outside expert, but also – and even more – the knowledge and experience of the participants.
- ✧ In the spiral model everyone teaches and everyone learns in a collective process of creating new knowledge, rather than only the teacher teaching and the students learning using the expert model.
- ✧ In the spiral model, education leads to action for social change, rather than to the maintenance and reproduction of the status quo.

Why we find the spiral model useful

✦ **The spiral model helps us work with creative tensions.**

a) tension between practice and theory

We began designing and facilitating education programs by the seat of our pants. It was only in reflecting on our own education practice that we realized we needed some theory. We learned from books and other experiences, including those in Central America. This learning led us to develop our own approach, the spiral model.

This is not the usual approach to developing theory. In school we learned that theory is something developed by the experts, something that usually seemed quite unrelated to day-to-day living and working. In contrast, we are suggesting that theory involves going down into a deeper understanding of our own day-to-day existence, rather than up into the abstract.*

So theory not only informs our practice but it also springs from it. In this way we are all theorists.

b) tension between action and reflection

Have you ever noticed how often social activists complain about having no time? In our result-oriented, "time poor" culture, time for reflection (or thinking) is not only limited but also often seems a waste of time. The spiral model helps introduce a dynamic relationship, between action and reflection, into the design of an educational event.

The starting point is experience (past actions). We reflect on and learn from this experience to develop new action plans for the future.

c) a tension between participant knowledge and new input

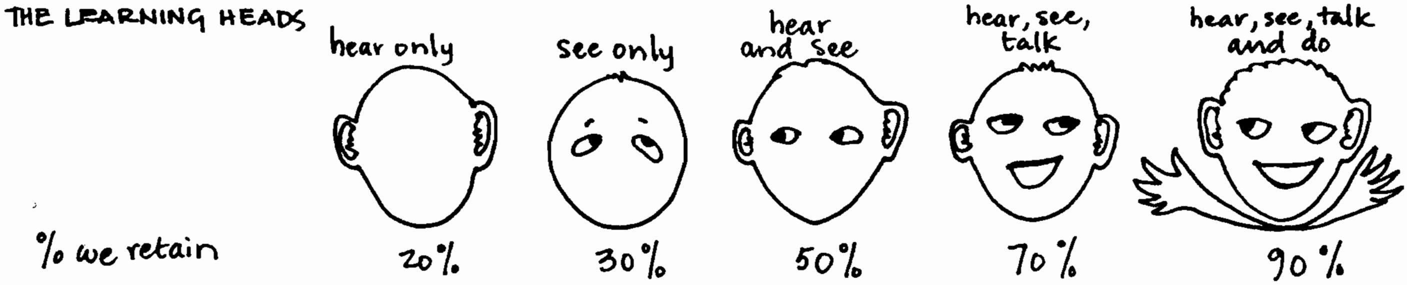
In our society, because we are taught to trust the experts, we don't usually learn to value lived experience as a source of knowledge.

In one trade union workshop, for example, an organizer shut off the video camera during a session when workers were talking about their experiences with a health and safety problem; and turned it on again when the U.S. expert arrived to deliver her presentation.

*** Thanks to Oscar Jara of Alforja in Central America for the concept of "profundización" (deepening).**

In contrast, the spiral model places a great deal of value on participant knowledge. Indeed, it links new input to the experience of participants.

✦ **The spiral model takes into account how people learn.**



We use the learning heads in some of our workshops to demonstrate that people retain more of what they learn when they use more of their senses and can apply what they are learning. The work of some academics in the field of non-verbal learning – while we often have serious reservations about how this work has been applied – has helped us understand more about how people learn. The spiral model allows us to use this new information in the way we structure our education sessions.

✦ **The spiral model uses what we know about effective adult education.**

Principles of effective adult education practice
or
How we know effective adult education is happening*

- participants see what they are learning as valuable
- the goals are clear
- participants can make mistakes
- the experience of all participants is valued and drawn upon
- new facts and insights are connected to what participants already know
- participants get direct and frequent feedback
- people share/debate/discuss what they are learning with others
- participants feel respected/listened to
- participants have input into how teaching and learning happens
- differences in identity and experience are acknowledged

* Adapted from the Canadian Labour Congress, *Instructor Training Course Manual* (Ottawa: Canadian Labour Congress, 1983), with the additional input of Anne Marie Stewart and Barb Thomas.

But this list is not enough for social change educators. Although effective adult education has a lot to teach us about how people learn and we use these principles in our work, they are just the first step.

✦ **The spiral model incorporates the principles of Education for Social Change.**
Deborah Barndt, an author and popular educator based in Toronto, talks about a friend who once said: "I find it dangerous to know HOW to do something without knowing WHY and FOR WHOM." The expert learning model trains people to adapt – to fit better into society as it is. Education for social change has a radically different goal.

As social change educators, we add to the principles of good adult education.

Principles of education for social change or How we know education for social change is happening

Social change education:

- critically examines unequal power relations, not just differences (race, class, gender, disability, heterosexism, ageism)
- names and challenges ideas and practices that support inequality
- anticipates and addresses conflict
- encourages creative expression
- uses the mind, hands, and emotions
- is a continuing process, not a single event
- strengthens organization
- encourages collective action for change
- models democratic relations between learner and leader
- includes both reflection and action
- puts local issues into national and global contexts

Education for social change is NOT neutral.

THE BUILDING BLOCKS

In putting together a program design, we ask ourselves a number of questions about the educational session: these questions and answers become our building blocks.

In our workshops with other educators, we often have participants talk about and then dramatize their nightmares about doing community education work. Here is one example:

A community centre servicing a largely immigrant community asks two immigrant women to facilitate a workshop on the issue of violence against women. The two women arrive early, set the chairs in a circle, and put their notes up on a flip-chart. When the participants – both men and women – arrive, they hesitate to sit in the circle but finally agree to do so.

As the facilitators begin it soon becomes evident that some participants speak no English and will need translation. When they've completed their introduction to the agenda, one of the men raises a hand to say that there is no violence against women in his community and he is opposed to this meeting. When the facilitators ask if anyone disagrees, there is silence.

Steering around our nightmares: who's coming and why

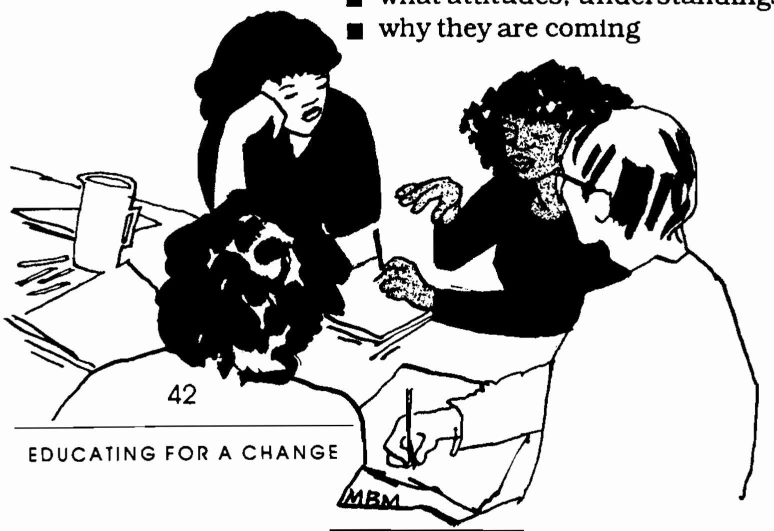
What prior information could have helped these educators manoeuvre around this situation?

In our experience, there are four important elements to think about before beginning to work on the design: the participants, things to guard against, the desired outcomes, and the resources and skills we have or need to get. A worksheet that we use in our skillshops for educators summarizes these questions.

✦ **the participants**

Some of the information we try to have in advance includes:

- gender, race, ethnic background, class, age, sectors, or areas of work
- first language / fluency in the language to be used in the session
- if/how well they know each other
- what experience they have with the topic
- what attitudes, understandings, skills they are likely to bring
- why they are coming



Worksheet: Thinking About Your Event

As the first stage in our design we work through these questions.

Total time available:

Title of your event ____________________________

Participants: What do you know (and not know) about participants attending your event? i.e. gender, race and ethnic background, first language, social class, age, sectors, areas of work; will they know each other's names; what is their experience with the topic; what attitudes, understandings, skills are they likely to bring to the workshop? Why are they coming?

Things to guard against or your worst scenario

What resources / skills do you have which will help you do this?
What do you have to get?

Setting some objectives

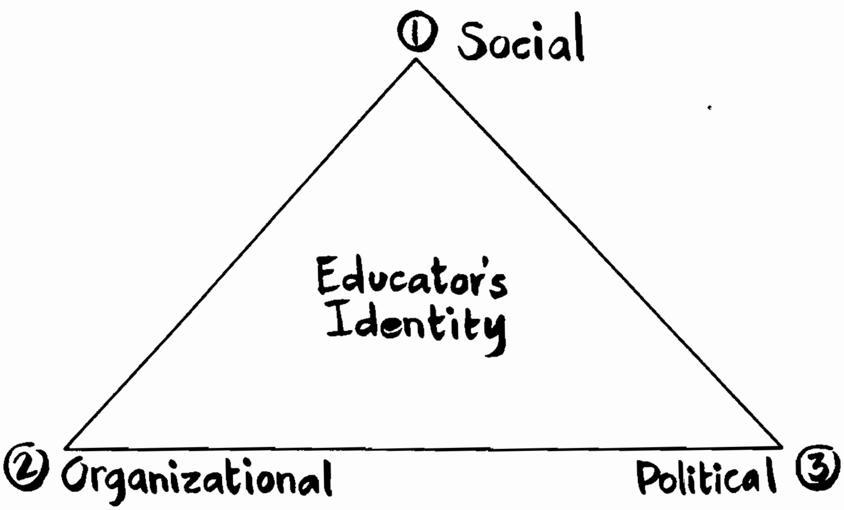
a) What specifically do you want participants to feel, know, understand, be able to do at the end of your event?

b) Identify 3 specific objectives for your event.

✦ **things to guard against – your worst scenario**
This is the moment to think about our nightmares. If we identify them in advance we can take them into account, possibly avoid them. In the example of the workshop on violence against women, we could have foreseen the possibility of challenge by a male participant and discussed and practised several responses.

We do want to stress, though, that in the design we are trying to look for ways to explore tensions creatively, not to flatten or avoid them.

✦ **resources and skills we bring/need to get**
In our design we identify ourselves in relation to the group and the issue, using the identity triangle introduced in chapter one.



Our two educators recognized that while they shared the same race and ethnic background (social identity) as most of the participants, their perspective on the issue was radically different. As outsiders to the community organization (organizational identity), they began to think about how to involve some of the participants in the planning process so they could together explore appropriate ways of introducing the issue of violence against women.

✦ **desired outcomes: what we want people to feel, know, understand, be able to do at the end of the session**
The educators needed more advance information about desired or anticipated outcomes. The community organization that issued the invitation might have been asked to name a planning committee to meet with the educators. At the meeting, the planning group would have had a chance to clarify what they wanted from a session on violence. Why were they organizing the event?

Then, if anyone challenged the basic purpose of the event, members of the planning committee would have been in a position to help the facilitators deal with the situation.

Getting the objectives straight

Having found out who's coming, formulating some desired outcomes, and discussing things to guard against and the resources we need to bring, we begin to set more specific objectives.

In our workshops with educators there are always audible groans when we get to this part. Setting objectives is not easy for any of us. Yet we've found it to be the most important part of the design process. Setting clear objectives really helps us all to be clearer about what we want to do. Once we have the objectives, it's easy to do the rest of the planning.

So, once the groans have subsided, we do an exercise that first asks people to divide into planning teams and fill in the "Worksheet: thinking about your event". In setting objectives, the first question we ask the educators to think about is what they want participants to feel, know, understand, and be able to do at the end of the event – a stage that is a process tool for generating objectives.

After this discussion the task becomes a matter of identifying three specific objectives for the event. Once this is done we come back together and ask one group to volunteer their work. Using the following guidelines, we rework the objectives together.

Guidelines for setting objectives

- ✧ Are they realistic for the time you have?
- ✧ Is there a clear verb that suggests an activity?
- ✧ Is the objective measurable? How would you know if you had done this?
- ✧ Is it appropriate to the group? i.e., could you express this objective to the group and get support for it?
- ✧ Is there a logical flow from one objective to the other? (refer to stages of the spiral design model)
- ✧ Do the objectives address what you want people to feel, know, and be able to do?

RICK ARNOLD

An example

After using the worksheet, one planning team volunteered their objectives for the full group to revise.

✦ **original objectives**

1. critically reflect on our own individual experiences of learning

The changes included use of verbs that suggested activities; making the objective more specific, keeping in mind the time available.

2. draw out and analyse principles of social change education.

Here there was a problem with the flow from #1 to #2 – in that you could not analyse what had not yet been introduced.

3. identify the aims of union education.

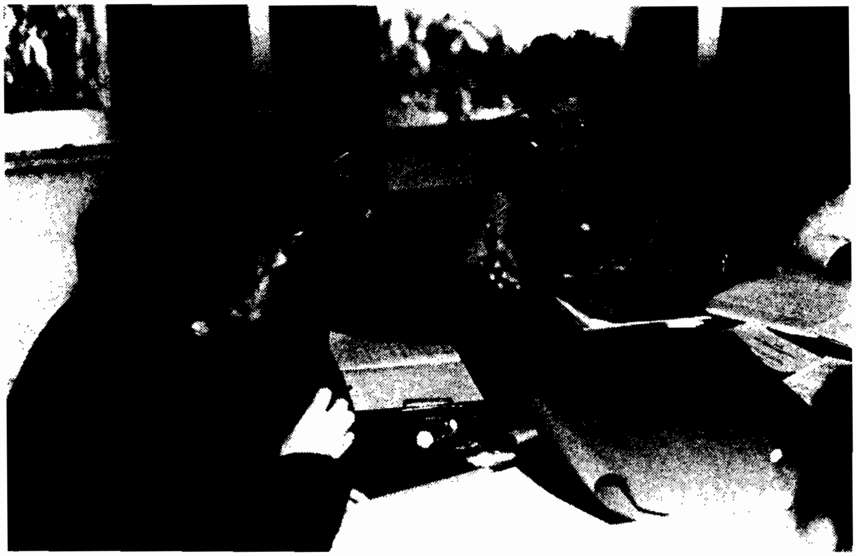
✦ **revised objectives**

1. describe and discuss our own experience of learning in union educational events

2. draw out and introduce principles of social change education

3. develop guidelines for the aims and organization of union educational events.

Using the flow of the spiral model as the planning guide, objective #3 needed to move towards some action or strategy, in this case policy guidelines for the union.



PUTTING THE PIECES TOGETHER

Imagine that we're taking the next step in designing an educational program – a workshop – together. We've broken the workshop up into its separate pieces: we know who's coming, and why, we've considered all the angles we could think of, and we've set our objectives.

Now it's time to put the pieces back together, which for us is the most creative and fun part of advance planning. At this point, keeping in mind the stages of the spiral model, we add a number of elements critical to any successful education event.

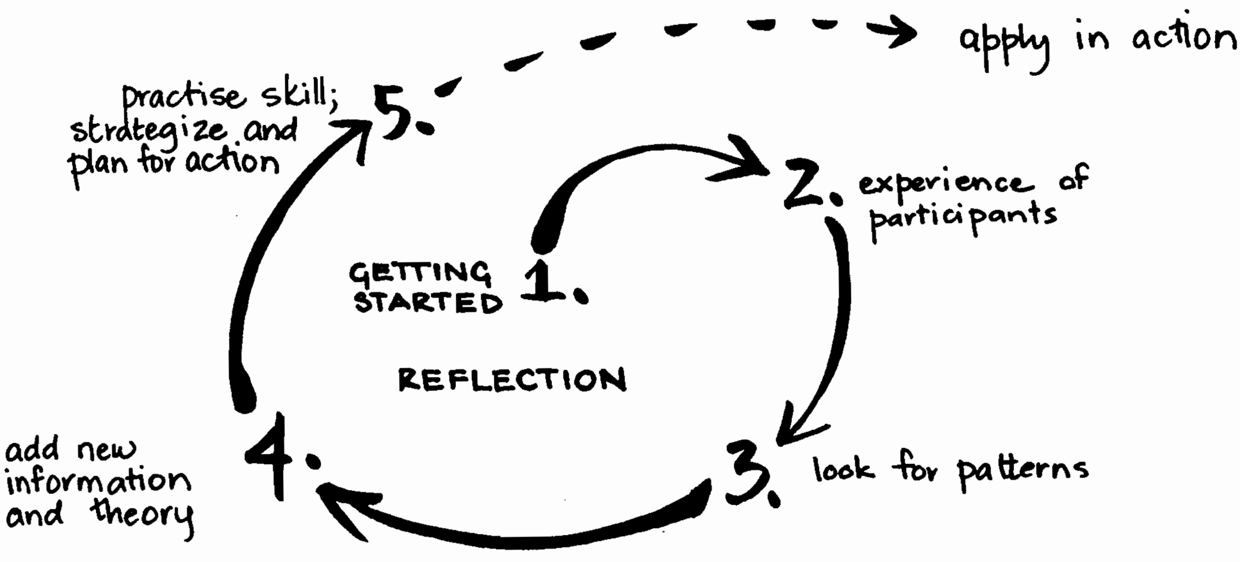
✦ **getting started**

In considering the design of our workshop, we note the tasks we will need to take care of at the outset of the event, such as introductions, finding out why people are there, discussing the agenda and objectives.

✦ **reflection**

We place "reflection" in the middle of the diagram to indicate that we want to build reflection and evaluation into the design all the way through – not just leave them until the end.

Stages of a workshop



Now let's move on to look at each stage of our design. We'll be talking about why we've found each stage important and about some of the problems we've faced. We'll share some tips on how to deal with these problems. In the next chapter we'll outline some of the activities that can be used at each moment in the design.

Getting started

One of the most frightening times in a workshop for the facilitator – and sometimes for the participants as well – is the first few minutes. You face a group you don't know. The group always seems larger than it really is, and the faces blur. If you're a participant you worry, "Oh no, this is going to be a waste of time." Or you're afraid you'll embarrass yourself somehow. So as educators, what we do in the first ten minutes is significant in setting the tone for the entire event.

We also know that first impressions are powerful. If we wow them in the first ten minutes, we can always coast until at least the end of the first activity! Joking aside, the issue of credibility is particularly vital for an outsider to the organization. It is a paradox in democratic education practice that before you can successfully give over control to the participants, you need to establish your credentials, to get their respect.

The mistake we most often make is not spending enough time in building relations among people in our events. When we don't take this necessary time, we find that we pay for it part way through. As social change educators, we see our role as providing support for the building of a movement for social change. Building trust in and among organizations within the movement is an important part of that role. To build trust takes time.

We have also found that it is important, though, to balance this need with the needs of task-oriented participants who want to see some hard content early on. In a shop-stewards course on grievance procedures, for example, participants will be anxious to start getting into aspects of dealing with the grievances of co-workers. If you start with too many group-building activities the level of impatience and anxiety in the room is going to build up – and perhaps come crashing down. So decisions about how much of what kind of activity to introduce depend on the particular organizational culture of participants (a concept we talked about in chapter one).

MARGARET MCCOLL

What to do in the first hour

The most basic task for beginning is that of introductions – people need to find out enough about each other and the workplan to feel comfortable. Also, to give people time to "get there" as part of our introductions, we ask them to talk about what they had to do to get to the event.

✦ **Establish your credibility.** For example, two of us who are not trade unionists were asked by the education director of a major union to do a session on popular education. We were not only outsiders to the union and the province, but we would also be presenting what might be considered suspect subject matter. After talking to the union members who had invited us, we decided to start by giving participants a sense of who we were. So we presented ourselves more formally than usual. We also got the union president to lend a little extra credibility to the proceedings by introducing the session and us to the members. In any session it is critical to let people know who you are and how you connect with them.

✦ **Find out why people are there.** Even when you've collected information in advance, all participants are rarely involved in the planning so there is a need to check expectations to make sure that the plan is going to meet their needs. This stage also lets people hear directly from each other and gives out the message that the intent is to make this workshop their program, not ours. We often put people's expectations down on paper, providing material that can later be used in the reflection at the end of the session.

✦ **Introduce the objectives and the agenda.** We introduce the objectives and plan for the event with reference to the expectations of participants and negotiate any changes. In this process we clearly name expectations that:

- are already part of the agenda
- cannot be met, which are outside the scope of the session
- can be included but would require some redesigning. At the subsequent session we can return with a concrete proposal for discussion about how these can be met.

A well-thought-out introduction to the program is evidence of your preparation and can be part of establishing your credibility. It is also a mark of respect for the participants.

✦ **Introduce the theme of the workshop.** This step can be part of the introductory exercises or activities for getting started, which we outline in chapter three. We've also found it useful to include an activity that helps the group situate itself in relation to the theme or topic: to look at who we are and who we aren't and at how these factors condition our relationship to the topic.

✦ **Negotiate the logistics.** At any event there is always a number of logistical problems to get out of the way before anything else can be done, from establishing guidelines on smoking to negotiating times for beginning and ending sessions. Especially in residential situations – when people are meeting in places overnight and far from home – participants not used to the situation will be preoccupied with questions about meals, telephones, and sleeping arrangements. Clarifying these logistics helps reduce anxiety – something we have underestimated in the past.

In union courses, a Class Steward is elected with responsibility for all logistics and complaints. Reviewing and negotiating the workshop schedule also help clarify logistics. We particularly check when people need to leave at the end of the session, because we prefer to finish early with most people there rather than having people drift out in ones and twos. A "collective agreement" might be developed to cover ground rules about logistics.

✦ **Set the atmosphere.** One important message people should get in the first hour is that we want them to participate in and take ownership of the event. To help establish this atmosphere, we choose introductory activities that give everyone a chance to participate. Within those activities there is often an opportunity to move the furniture around so that people will begin to claim the space as their own. (See chapter four, "USING SPACE: THE POLITICS OF FURNITURE.") We often establish a process for our work together by putting forward our assumptions about the process and negotiating those with participants. We post a list of these assumptions and use them as a reference throughout the session.

DMI ARCHIVES

Our assumptions about a workshop: a sample list*

- Everyone will help contribute to a safe/non-judgmental environment.
- Much of the content will be coming from the participants.
- Participants bring analysis/experience to the program.
- Everyone will have a shared intolerance for all forms of oppression.
- Participants will take responsibility for their own learning and interaction with other participants.
- Everyone will participate fully in all sessions.
- People will bring a sense of humour.
- Everyone will set objectives for a three-hour workshop and design one activity.
- There will be tolerance of differences in approaches and strategies.

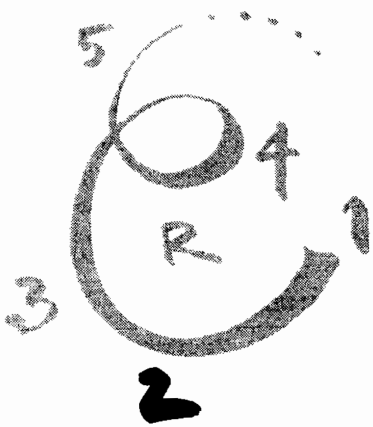
Chapter three outlines some of the activities we use for getting started. We also use a summary checklist – and when we forget three or four items on this list we know later on why things didn't go as well as they could have.

A getting started checklist

- introductions to each other
- set the atmosphere, build the group
- reflect on the social identity of the group in relation to the topic
- identify participant expectations
- introduce the theme of the workshop
- introduce the objectives and the plan for the event, referring to the expectations of the participants
- get people "there" mentally as well as physically
- establish a process for the event with participants
- clear up any logistical details (washrooms, lunch)
- negotiate ground rules (smoking, meeting times)
- give participants a chance to claim the space in the room

• Two of us prepared this list for a five-day workshop with the African National Congress in Lusaka in January 1990. We also included several assumptions about ourselves: 1) we know less than participants do about this social context; 2) the fact that we are White Canadian women has shaped our particular knowledge, experience, and perspectives; and 3) we bring a knowledge of the theory and practice of social change education and will contribute it as appropriate.

Getting out people's experience or knowledge of a theme



Starting with what people know – with their experience – provides an important statement to the participants. It says that we value what they know, that their experience is important. It also helps people recognize their own personal resources: how much they can learn from each other; how much they already know about a theme.

Feedback from many participants tells us that this beginning is also an important moment for starting to build a different kind of relationship between student and teacher. There is a sense of energy released in a session as we uncover the richness of experience and resources with a diverse group of people.

For the educator/facilitator this beginning also provides invaluable knowledge. It's a way of determining what people already know, so that you won't bore them with old information.

Besides these practical considerations, there are clear political implications in not putting people's knowledge and experience at the centre of the program and making them central to the opening session of any educational program. What messages do we convey through an education that feeds information to people, assuming they know nothing? Such practices come down again to supporting the dominant social belief in experts (usually those sanctioned by people in power). Instead of encouraging action, these practices encourage passivity. Both the content and the process of education are political.

We must admit that several educators, reflecting on their own experience, have taken issue with us on this point. They say, "But it is often the participants themselves who want to hear from the expert. They want us to give the input – and feel that talking about their experience is a waste of time." This response really isn't a surprise when you reflect on the two dominant educators in Canada: the schools and the mass media. In these two key outlets the knowledge that is valued comes from experts and not from experience, feelings, and intuition. An important task we have as educators for social change is to encourage people to value their own experience, to increase our collective self-confidence to act for change, including change in the process and/or content of the education program itself.

Most often, we find, participants embrace the chance to talk about their own experience. The resistance comes from educators: worried about what will happen if they give up control; afraid of "not having all the answers"; concerned about people coming to the "right" conclusions. As social change educators, if we only talk about people taking control and don't adapt truly democratic practices in our education programs, we are working against our own long-term goal of supporting people to empower themselves to transform society.

Tips on pulling out people's experience and knowledge

A reader of an early draft of this chapter made it to this point and said, "That's all very well, but how do we do this?" Chapter three provides part of the answer, with its outline of the activities we've found useful at this stage of our workshops. Here also are some of the points our experience has taught us to consider in pulling out people's experience.

✦ **what experience gets shared where and why.** Since their own experience is something people know a lot about, you need to carefully draw out the information from this experience that you want to work with later. For instance, if you generate more information than you will be able to process later on, people may feel frustrated or even negated because part of their material isn't used.

✦ **how much data you want to take up in the full group.** We may have people discuss three questions in small groups but ask them to report back on only one. Participants should know in advance that only one question will be shared with other groups.

✦ **the emotional impact of sharing experiences on the theme.** In a workshop with women educators working on the issue of woman abuse, we did not take sufficiently into account the fact that there would be abused women in the group who would need additional time and support to deal with their own pain. The emotional cost to a person will be directly related to his/her social identity and relationship to the theme of the session.

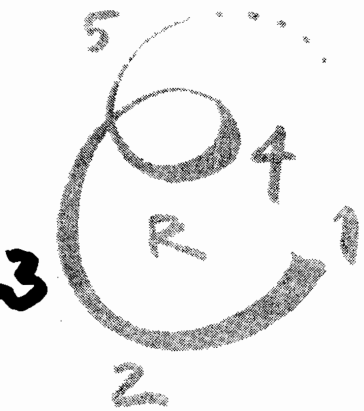
✦ **the social identities and mixture of the group.** In a session on racism, for example, it is crucial to consider the relationship of participant experience to the theme. If there is to be a mix of people of colour and White people, the dynamic this will produce must be taken into account in your design. For example, there is the threat to a person of colour of "voyeurism" by White participants who don't need to deal with the day-to-day lived reality of racism.

✦ **the ways in which participant experience relates to the topic.** In a workshop on the media, for example, the way in which participant experience relates to the theme will be very different for journalists or community people interested in media access. In a session that includes both groups, how can you create an opportunity for learning from each other? If only one group is present, how can your design include the other voices?

✦ **the kinds of questions you will ask.** We have found that coming up with the right questions is the single most important decision we make. The questions need to be few, clear, simple, and considered from all angles. There are other considerations as well, such as whether to have open or closed questions or to identify "generative" questions on a theme.*

* For more on questions, we suggest the article "How to use questions effectively," by Patrick Suessmuth in *Ideas for Training Managers and Supervisors* (La Jolla, California: University Associates, 1978).

Looking for patterns in our experience



Canadians do have the "freedom to choose" – from among, for instance, some fifteen different brands of washing detergent. The choice of course, is often an illusion, because a handful of companies put out the "different" brands and most if not all of the soap is more or less the same. But this illusion of a "freedom to choose" – with the focus on our individual rights and freedoms – creates a special challenge for educators working to build collective action for social change.

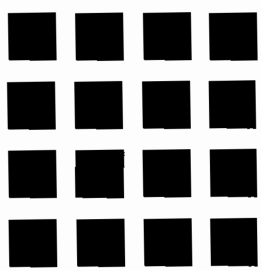
For us, the step of collectivizing experience, then, is very important. And for us one of the fundamentals of collectivizing experience in educational events is (perhaps ironically) to break down into small groups so voices have a chance to be heard. Then those voices are brought back in some form (through an appointed speaker or a dramatization, for instance) to the full group or plenary session, where we look for patterns in common.

After people have had an opportunity to talk about their experience and identify patterns, something we often hear is, "And I thought I was the only one." By finding patterns we recognize that many of our problems aren't ours alone and, just as important, aren't our "fault".

How can it be "just my fault" when other people say they've had similar experiences? When we identify patterns we also try to keep in mind the difference between what it means to have the same experience and what it means to have similarities in certain aspects of our experience because of different social identities.

In collectivizing knowledge or experience, we have the opportunity to learn from each other. Participants in a workshop or other event can also realize how much they know collectively, as a group.

Take a quick look at the graphic below. How many squares are there?*



Now ask some other people near you to look at the design. How many squares do they see? How many do you see when you work together? There are supposed to be thirty-one squares. Our group could only find thirty (1x16, 4x9, 9x4, 16x1) – if you find the other one, please let us know.

You might want to use this exercise in your organization to make the point that collectivizing knowledge and experience is worthwhile.

* University Associates, California. Used in adapted form in union education, including *Steelworker Training Manual for Local Officers*, Toronto, 1984.

Tips on collectivizing experience and knowledge

✦ **Don't suppress difference.** In focusing on the patterns in experience it is important to acknowledge and engage difference. One useful question is: What are the similarities and the differences in your experiences? For example, men (non-harassers) and women see the prevalence of sexual harassment in the workplace in totally different ways.

✦ **Arrange the process to ensure that everyone has a voice.** When you have small groups reporting back to a large plenary, how often have you seen a first group using up all the time and covering all the points,so the others are left feeling frustrated and disappointed? To avoid this, we sometimes ask people to present one point only, so we can move along and make sure that the last person or group will not only have time but also still have something to add.

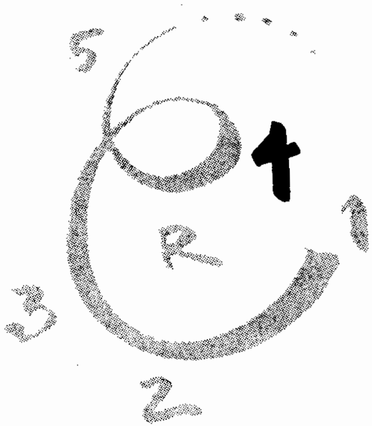
✦ **Ensure that the plenary isn't a repeat.** It's frustrating for participants if the plenary simply repeats what took place in the small groups. So we have to consider how the collectivizing of the experience will move the discussion forward (raise a new point, expand on an important issue). You might ask groups to identify points of energy or tension as the focus for deeper plenary discussion. (See chapter three, "STEPS OR MOMENTS IN AN ACTIVITY," for different ways of reporting back from small groups.)

✦ **Consider the range of organizational roles among participants.** The degree of variety among the people you're working with will influence how much time you need to take things up. For instance, in a workshop with a whole organization where you have a mix of program staff, management, and board, you will need longer than if you were working with only one of these groups.

✦ **Don't try to pursue everything in depth.** We always have to select – that's why establishing clear objectives is so important. Focus on one or two central ideas and let the rest just flow on past or flag them for another time and place. One caution: it is possible for a key point that wasn't considered in the objectives to emerge in the process. Check with the group to see if they want to refocus the session or pursue the original design.

✦ **Have participants look critically at their experience.** There are some questions that help to do this. Are there any surprises? Insights? Do you see any patterns? How do your (individual) experiences compare with the general patterns we seem to be seeing? What are the similarities and differences in the presentations?

Adding theory/new information



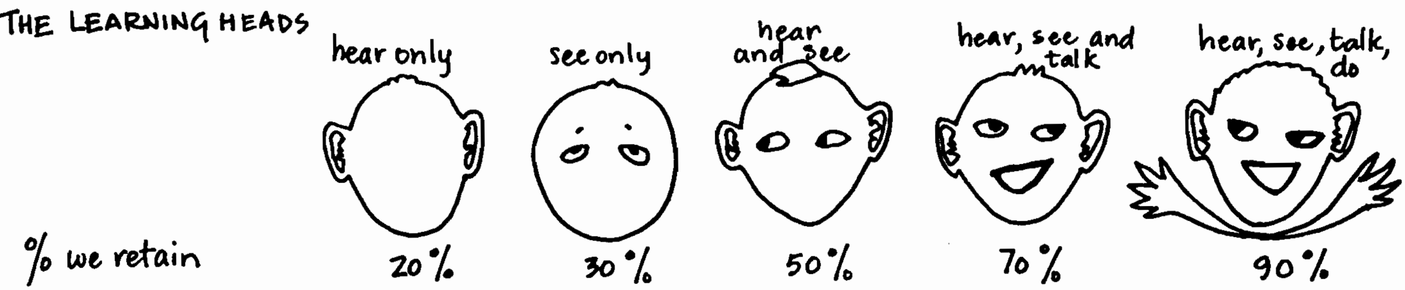
One of the misconceptions about popular education or social change education is that all of the information has to come from the participants themselves. On the contrary: we feel it is important not to limit people to the information and experience they have in the room. Although we want to validate participant experience and knowledge, we do not want to romanticize it.

But it is true that for social change educators whose task is to empower people, how we add new information takes on political importance. Our process must affirm what people already know while suggesting new questions and frameworks for deepening understanding. For example, in doing workshops with educators we encourage the participants to share from their own experience what helps and hinders their learning. After collectivizing that material we briefly introduce the principles of adult and social change education and provide theory on how people learn. (This is where the "learning heads" introduced earlier come in.) But we make a point of showing participants how they had identified most of those principles and theories in their own learning. Now, we hope, their own learning has been put forward in a framework to which future experience and information can be attached.

Adding new material can also be an opportunity to connect to other, outside struggles and issues. For example, in a workshop with food industry workers in Canada we looked at building alliances with other sectors in their industry. After we spent some time considering the successes and failures of the participants' past experience in alliance building in Canada, we introduced a case study of the Guatemalan Coca Cola workers. As we looked for similarities and differences between the two cases, some additional strategies suggested themselves for possible use by their unions. The workshop also built solidarity – ending with a telegram of support from participants to those on strike in Guatemala City.

Participants often have specialized knowledge that we can draw upon in the workshops; and/or we can bring in outside resource people and resources. In addition to deliberate presentations, we shape the information that is generated by how we structure the sharing of knowledge and experience among participants, by the questions we pose, by the issues we take up, by the anecdotes we add to participant comments, and by using case studies and other exercises.

Nor does new input have to be limited to the session itself. It's always good to come up with a collective list of reading materials or human resources for future consultation; we often use a flip-chart for this purpose.



Tips on adding theory/new information

✦ **participant energy level and the time of day.** As a rule of thumb, we try not to make presentations just after lunch. When we see from body language and drooping eyes that energy is sagging, we add energizers. A few of our favourites are included with the activities in chapter three.

✦ **how people learn.** Keeping in mind our learning heads, in adding new information we try to use as many of the senses as possible for greatest retention.

✦ **organizational culture.** We need to be sensitive to organizational culture as we introduce new content. How large trade unions make decisions or share information is very different from the way small community resource centres do. So when we add new information we consider what will be most effective in the particular organizational context. Print? Film? An oral presentation? A play?

✦ **what resources are available.** This comes back to advance planning: we need to do research before the event to see whether there are resource people, audio-visuals, or other resources we should consider using.

✦ **literacy levels of participants.** This consideration will help determine what if any of the resources on the topic are appropriate to your situation.

✦ **the question of voice.** It is crucial to critically preview any audio-visual resource before we use it with special attention to the issue of voice: what is the racial, ethnic, and class makeup of the resource and the perspective of its message? Our bibliography here lists several resources that help identify the questions we should all be asking about the audio-visuals we use. But it's also possible to use less-than-perfect materials critically and involve participants in raising questions of voice.

✦ **how to relate new content to what participants already know about the topic.** To aid understanding, we need to be clear about how the new information or theory relates to what we already know. One way to do this is to build in a continual review of new input in light of experience.

ALOK MUKHERJEE

Practising skills, forming strategies, and planning for action

After sharing and analysing experiences and deepening understanding through the input of new information and theory, participants are usually ready to act on what they've learned.

As we've seen with the learning heads, most learning occurs when people try on what they've learned – when they do something with it. So one thing we want to ensure is that participants have a chance to practise their skills. It's like public-speaking courses that use video to give participants a chance to practise in front of a video camera, with co-participants as their audience.

We also want to make sure that there is time to form strategies and plan for action. It is in this commitment – to take action – that social change education radically departs from mainstream adult education.

Our school system poses education as exposure to ideas – learning "all sides" of a question. Individual students, presumably, are left to make up their own minds about what to think. When teachers discuss action they tend to do so in the abstract and as a personal (or private) matter for their students. They limit action to activities that are not too "political".

While our task as social change educators is not to define for people how they should act, our programs assume that change comes about because people take action, collectively as well as individually. One of our goals is to strengthen organizations – and organizing skills. We are involved in education for action.

Tips on practising skills

✦ **Consider the risk involved in "performing" before your peers.** When, for instance, participants in an event are video-taped in front of the others, most of them tend to get very anxious. They all want to do well but are sure they'll mess up. So we need to take steps to make sure everyone feels safe in this kind of situation. Something that has worked well for us is to have participants develop guidelines for giving feedback to each other. This process is described in more detail in chapter four, "GIVING AND GETTING FEEDBACK."

✦ **Give participants control over any product.** For example, when we make videotapes in a workshop, we give the participants a copy of their presentations and feedback to keep. If we want to use any aspect of it in other contexts, we negotiate its use with the person(s) involved.

✦ **Build in adequate preparation time.** The workshop design needs to allow people enough time to prepare to practise their new skills in front of their colleagues. Without adequate preparation, the anxiety level increases and people are more likely not to do well.

✦ **Design time both to practise and to discuss the experience.** Adequate discussion time is especially important for participants who are not happy with their "performance". But for all participants there is a great deal of learning in the reactions of their peers, as well as in the unravelling of their own experience during the practice exercise. If the practising of skills runs overtime, which it often does, be sure that everyone gets time to practise and that the last few people aren't rushed. This means that you need to consider beforehand what you are willing to drop from the program.

Tips on forming strategies and planning for action

✦ **Consider the organizational context.** What are the possibilities for action and application within the organization(s) represented by the participants? If possible, clarify this information in advance with the planning committee.

✦ **Find out where and with whom people will be exerting influence.** In action planning, we often consider the use of caucuses: that is, whether there is merit in dividing participants according to their location within the organization. For example, in a union session we might have the stewards in one group and the local union officers in another.

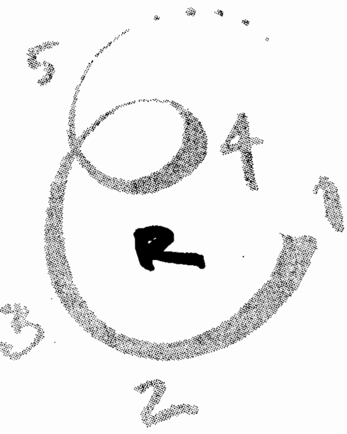
✦ **Consider both collective and individual action.** We strongly encourage collective action, allocating most of the discussion time to group strategies. It's also important to give participants a chance to focus on their individual roles and responsibilities in follow-up action. One tool we've used is the "letter to yourself" at the end of a session. Participants write a letter to themselves, outlining what they want to have accomplished by the time the letter is mailed to them in the future (the date is predetermined). The facilitator collects the sealed letters and mails them as follow-up on the predetermined date. A collective letter, produced as a summary of proposed actions and posted in the workplace, can also be a powerful reference.

✦ **Leave time to identify the next steps for whatever action is called for.** Before people leave the session, we usually identify some "next steps" – who will do what and when. In some cases there is also a need to identify a co-ordinating group or follow-up committee.

✦ **Identify how you will evaluate the proposed action.** How will you know if you have been successful? When and how will you critically review the action and see what new strategies are called for?

DEBORAH BARNDT

Reflection and evaluation



As social change educators, we also want to find ways to open up our work to constructive criticism.

We used to only do evaluations at the end of the event, asking questions like: Did we accomplish what we set out to do? Did the people who came meet their objectives? One problem we've faced, though, is that participants tend to be polite at the end of a session whereas in the middle they are more likely to be frank because their input could affect their own learning.

Increasingly we realized that to be effective we needed information from participants during an event about both the content and the process so that we could make the necessary changes as we went along. We ask some of these questions:

- What are you learning? How are you feeling?
- How is the content useful? What else do you need?
- Who has participated / who hasn't? Why?
- How is the pacing? Too fast or too slow?
- How is the balance between new and familiar content?
- How is the language level? What has been clear / unclear?

So we began to build in evaluation as a reflection on the process, throughout the event. That's why we place "reflection" in the middle of the spiral. One activity we use – which we call "the Fly on the Ceiling" – involves participants stopping each day to reflect on what they've been through. This gives all of us an opportunity to look back and ask ourselves: What did we do? What did we learn or feel? What can we use or adapt for our own work?

We also use "Process Observer Reports": each day two participants take responsibility for collecting information from the others and for delivering a verbal report on the process at the beginning of the next session.

We describe these activities, along with others, in greater detail in the next chapter. We find that not only does ongoing reflection give us information we can use to modify the design as we go along, but it also helps participants take greater ownership of the process. Feedback indicates that when the facilitators are open to the frank, honest critique of participants, we help build more equal relations among everyone.

Some educators worry that this built-in repeated reflection takes up too much time. But, for our part, we made an extremely liberating discovery we'd like to share with you: you don't have to cover all of the items on your agenda. As social change educators we are trying to empower people for action, and sometimes that means encountering resistance. If we cram the session so full that every participant voice that is raised seems to be a delay, what does that say about the importance we attach to the views of participants?

We have found that the element of time can be used as a mask for underlying political values or choices. Participants will most likely read "We don't have enough time for that" as "This doesn't matter" or "I don't want to do it".

We think it's important to build in time for people to take control of the education process, to negotiate real changes in the agenda, and to resist overload.

Sometimes it is necessary to have a formal evaluation at the end of the event, for political reasons (funders demand it) or maybe because it was a pilot program and you require the information. End-of-session evaluations can also become an integral and critical part of the learning process – building on ideas that came up earlier and are just beginning to be digested.

Even when there is no need for a final evaluation, there is a need for wrapping up, for closure. Some of this need has to do with human stuff, like goodbyes. Some of it has to do with follow-up, with being sure that everyone is clear on who should do what. The next chapter includes some of the activities we've used for end-of-session reflection.

RICK ARNOLD

BARB THOMAS

Tips on building in reflection

✦ **time for redesigning.** When they build in the space for participant critique and suggestions, facilitators also require time to take that information into account and redesign the agenda as they go along. They may have to miss lunch, stay up late, or, preferably, build meeting times into the agenda during periods when participants have free time. We also ask participants to put forth any major proposals for change as early as possible, or we can't be responsible for the failure to address them.

✦ **the length of the session.** There is both more need – and more time – for reflection during a long event than during a short one. But even in a shorter session, a one-day workshop for instance, we build in a mid-point check on how things are going.

✦ **where to cut your agenda.** Most of us suffer from the tendency to overdesign – to pack too much into an irresistible agenda. In our experience, cutting in the middle is always best. Keep the opening and closing. You need to ensure that you don't cut out the time you need at the beginning to lay the group foundation for good working relations, or the time at the end for the action discussion.

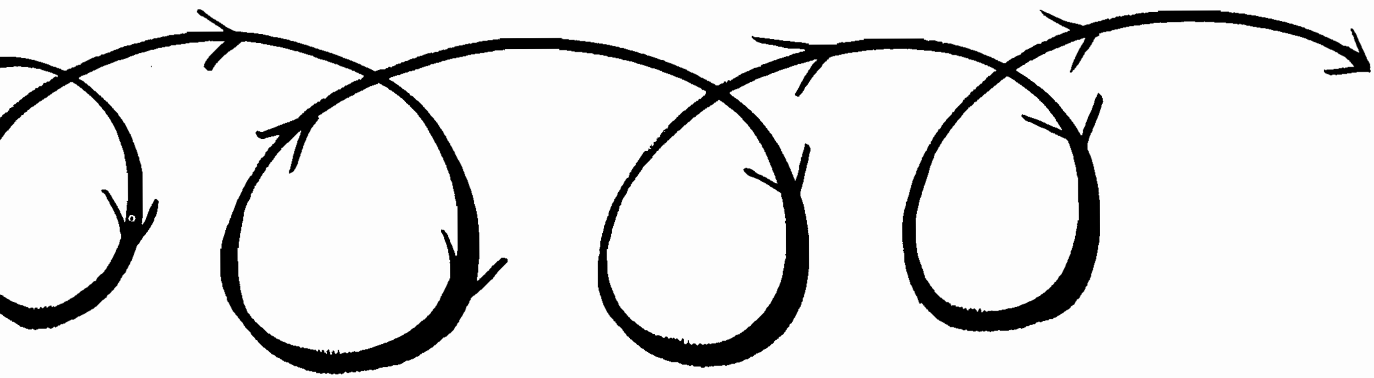
This is not a call for activism over analysis. Rather, we recognize the importance of moving through all of the moments on the spiral and of making sure we don't drop off planning action due to lack of time.

✦ **what you want feedback on.** The specific points for reflection change during an event. While the earlier part tends to focus on more general questions (what was useful/not useful), later on the focus may fix on one specific problem. For example, in one workshop for community educators we had a day that was too full, so that participants were exhausted at the end. The reflection focused on this problem: what it felt like, how it happened, and how it could be avoided.

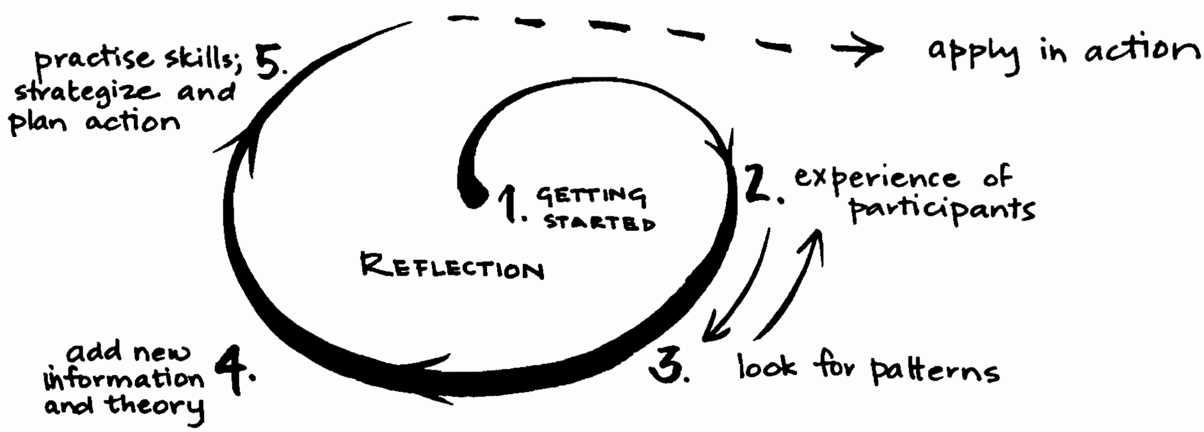
✦ **time for discussion.** In designing a program we try to include time for people to think individually or in pairs about the questions posed, and for general discussion. It's especially important to arrange time for general discussion when there have been problems in the process of working together that the group needs to address, or when a group needs to develop a collective commitment to a common action plan.

✦ **making visible participant input.** Using a flip-chart, we write up the objectives and agenda for each day and review the whole program during the first session. Based on continuing participant input, we revise the agenda and note any changes in a different colour with a marker pen. In longer courses we review the revised agenda for each day at the beginning of the morning, noting how we have taken participant suggestions into account.

A twist in the spiral Now that you're ready to try out the spiral design model, we have one more twist for you. If we did a drawing of many of our events, this is how they might end up looking:



The sketch may look like a slinky toy, but its purpose is to illustrate that the model is not fixed or linear. In any one session you may travel through the phases of the model several times. Another variation might look like this:



In this one the arrows move back and forth between the stages of sharing experience and of finding patterns. In this workshop people shared their experience and explored patterns on two aspects of the theme before moving on to add new information and theory.

For us the importance of the spiral model is the way it helps us to think through the design – beginning with what people know, with their experience, before moving on to new information and theory and ending with action, where they use the new learning to help contribute in some way to the process of social change.

Documenting the process

"Our event was a great success!! Too bad no one thought of keeping notes or taking photos. I guess it will have to live on with the rest of our oral tradition."

Documenting our work is a political responsibility. We took the first step towards doing it when we began to record and keep our own design outlines on paper. The second step was raising the issue of documentation of the event for participants in the planning process.

Documenting the design

In the past some of us have taken pride in our capacity to "wing it" and have been effective solo performers. But if our goal is to build stronger collective organizations, the "winging it" style has serious drawbacks. Documenting an event is one way of including, of making explicit and available, what may otherwise appear to be our individual, personal talents.

Before we began recording and keeping our designs we couldn't draw from our past work in a systematic way. We also had difficulty sharing that work, both with other educators and with the participants. So we began to write down our designs, and now we use a "design sheet" as a way to record our intended designs and leave room for revisions as we go along.

We often hand these design sheets out to participants at the end of the event, especially to educators who may want to adapt a design for their own use. For us this work is all part of demystifying the process of educational leadership. This demystification is in turn an integral part of the democratic process.

Documenting an event

A video? A photostory? A written report? The nature of the documentation depends on the objectives of the event, on who will use the report and how, and on the equipment and resources available.

Increasingly we find that participants want their work returned to them, preferably during the event. So in longer sessions we put the material generated in each session onto a flip-chart and then into the computer. If we have access to duplicating facilities we can make copies available for participants the following day.

Participants can also share in the process of documentation. In one workshop a production subgroup produced a booklet of the event and had it photocopied for all participants in time for the closing ceremony.

DEBORAH BARNDT

Design Sheet

Name of Workshop ____________________

Participants

Objectives

1.
2.
3.
4.

Time	Activity/Details of the process	Materials needed	Person Responsible

Tips on building in documentation

✦ Assume your experience is valuable to someone else.
✦ Raise the issue of documentation in the planning process.
✦ Decide in advance who will use the information, and how.
✦ Name particular persons and groups who may be interested in the report.
✦ Take the resources available (financial, material, human) into account.
✦ Based on the above decisions decide on format (print, video, photos, manual, or descriptive), when to produce the document (during or after the workshop), and what its basic structure or content will include.
✦ Decide who will be responsible for documentation during the session and for pulling the material together following the event.
✦ Make a realistic estimate of the time needed to turn the raw material into a usable document.
✦ Identify resources needed (financial, material, human).

Documentation is one of the ways we, as educators, can make sure we follow our own model and apply in action what we've learned in the workshop.

BARB THOMAS

A DESIGNING CHECKLIST

In training workshops we've done, one exercise we've often used is to have people reflect on what helps them learn and what hinders them. After talking about these experiences, participants are asked to review the material generated and come up with a checklist of what makes for effective workshop planning and design.

We drew on the work of those participants earlier in this chapter when we outlined a checklist for planning. Here we offer a summary checklist for effective design, which once again draws on the expertise of workshop participants.

We've left room for you to add any points we've missed.

A checklist for effective design

- Have a planning committee of participants to help in the design
- Take into account what you know about the participants
- Visit the site and take the physical space into account in the design
- State your own assumptions in advance
- Take into account the organizational and broader societal context for the event
- Be clear about what kinds of events/actions have come before and will follow this session
- Anticipate potential problems and how they might be handled
- Have clear, stated objectives that follow the spiral design circle
- Have a clear, written agenda, which fits the time available
- Have a mix of activities that encourage participation and take into account the background of participants
- Build in ways for participants to gradually take more control of the process
- Know how people will be broken down into groups and how the groups will report back
- Plan for breaks, energizers, humour
- Build in evaluation during and after the event
- Identify clear responsibility for follow-up
- Have a clear plan for documenting the process for participants
- Review your plan and cut it down; you probably have too much
-
-
-
-