TRAIN THE TRAINER MANUAL

Training is a fun and exciting way to teach others a new skill. It is the facilitator's responsibility to guide the group toward reaching the goals and objectives of the training. As a facilitator, you do not need to be an expert or even the most knowledgeable person in the room. However the facilitator should be the most prepared person in the room. Being prepared means having a thorough familiarity with the materials, and it also means having a few tools and resources to use throughout the actual session. Before we share habits of effective facilitation, we want to review with you how to digest DCCC trainings and deliver them anytime and anywhere.

This manual is designed so that anyone can pick it up and have the understanding and tools necessary to facilitate a DCCC training. Inside you will find directional guidance on preparing and leading a training, as well as practical tools that facilitators can use.

Resources

HOW WE FACILITATE LEARNING

ANNOTATED AGENDA: An annotated agenda outlines the presentation duration, necessary materials, goals, link to presentation and provides talking points for all slides. Anyone should be able to pick this document up, read and digest it, and be able to give the training.

FACILITATOR GUIDE: The facilitator guide is a shareable shortened version of the annotated agenda. This guide outlines key points the facilitator should mention and provides notes on how to lead the training. This document is designed for trainers who are experts with the content being presented.

Either a guide or worksheet accompanies almost every training. These documents ensure that the audience is able to learn and digest the material once the training is complete.

GUIDE: The guide is a shareable document for training participants that highlights key points from the presentation. This document outlines important information we'd like the audience to remember once the training ends.

WORKSHEET: The worksheet is a reflective document for training participants designed to be an assignment take away sheet that participants can complete either during or after the training. Some trainings will require an overview of the worksheet for participants to complete after the training, or time for participants to work through the sheet during the training.

HOMEWORK: This is just what you think it is: a chance to practice what was just learned in the training session. Homework is designed to further learning during or after a session.

TIPS + TRICKS FOR TRAINERS

1. PRACTICE YOUR SESSION, NO MATTER WHAT!
2. At the start of the training, **establish norms for the session**. Let the group decide what these should be, write them on butcher paper and display them at the front of the room. Typical training norms include things like “we will stay on schedule,” “we will be respectful of other participants’ ideas,” and other similar concepts.
3. When writing on butcher paper, **alternate colors of markers**. For example, when writing out a list, use a red marker for the first point, and a blue marker for the second point. This will make the writing more visible to people in the back of the room.
4. At the start of the training, **be clear about when you’ll be answering questions**. Post a piece of butcher paper at the front of the room with the title “Parking Lot.” If someone asks an off-topic question, acknowledge it is important, but that it is off-topic for the session. Write the question down so that it may be addressed at a later time.
5. When posing questions to participants for discussion, **don’t be afraid of silence**. People need time to think and reflect. Silence will help someone build up the courage to make a valuable point. As a rule, count in your head and wait seven seconds after posing a question. It will feel like forever to you, but resist the urge to break the silence!
6. As a way to prevent one or two people from dominating the conversation, don’t ask people to volunteer to contribute to the discussion; instead, **call on people who aren’t speaking up often**. One trick is to visually divide your training space into four quadrants. For each discussion point, call on participants from a different quadrant.
7. When asking participants if there are any questions, **phrase it openly**: “What questions do you have?” If the question is closed in nature, participants may not feel comfortable asking questions. Avoid asking “Are there any questions?”
8. Acknowledge that you are hearing and understanding participants by **repeating back or paraphrasing their comments**. This will let your audience know you value their comments, and you are actively listening.
9. Prevent discussions from careening off track by **setting expectations**. “We’ll discuss this for five minutes and then move on,” or “I’d like to hear from four people on this topic before we move on.”
10. When someone poses a question you’re not sure how to answer, **throw it back to the group** by simply asking, “What do you think?” This will almost always result in the group answering the question in the best way possible.
11. **Set an atmosphere of openness and trust from the onset**. People will relax in to the new setting and more openly engage with the session.
12. Use **simple, direct language**, and **listen intently** to fully understand what is being said.

TRAINING CONCEPT: The SEE-I

State	Elaborate	Exemplify	Illustrate

SEE-I is a training method that is meant to clearly communicate a new concept to others. The process behind the SEE-I is to create a clear description for those new to the concept.

- It begins with a clear **statement** of the concept being introduced. This is the **"S," State**. You are stating the concept in one to two sentences.
- The trainer then **elaborates**, by giving examples and even counter examples in their own words. These statements can begin with, "In other words…" followed by the example. The key here is that the definition has already been given, but definitions on their own do not always convey the intended understanding. By using your own words, the trainer is able to build around the definition with some plain-language examples.
- Now give detail-specific examples. **Exemplify** the concept through concrete examples of the concept. A counter example here can help clarify as well.
- Illustrate using a metaphor, analogy, diagram, or picture. This can help create a connection between an already understood concept – to the new concept.

EXAMPLE

The following example defines terms used in budget management, by using the SEE-I concept:

State	Elaborate	Exemplify	Illustrate
the concept or idea in a sentence or two	the concept in your own words	the concept with concrete examples	the concept with a metaphor, analogy, picture or diagram

"Before we dive into the thick of it, let's start with **defining** some basic terms associated with managing a budget. *Budget* means a plan of operation expressed in terms of financial or other resources requirements for a specific period of time. In other words, a budget is an estimation of revenue and expenses over a specified future period of time. Your budget will be reevaluated on a periodic basis, as it is a living, breathing, and changing document. An example budget will most likely be in excel format where you can make edits and share with others easily. A budget is like a roadmap of all campaign finances from now until Election Day. Think about it like a road trip you are planning with friends. The budget is the roadmap for the money you will spend to get to your final destination."

THE NUMBERS

Numbers create transparency by communicating the hard, quantifiable metrics that were achieved. It's important to track data that can then be relayed into strategic information to share both internally and with outside stakeholders. By having number totals and using visuals to convey data, you can make the case for the objectives and goals achieved. Internally, data and information can influence decisions and shape future trainings.

Tracking Data + Information

Data alone, without context, will not mean much outside of the person collecting it. For those outside of your immediate team, the data alone is raw and needs to be analyzed or processed into information that will contextually translate to those outside of your team.

- **DATA:** raw, unorganized facts that need to be processed
- **INFORMATION:** the data is processed, analyzed, organized and structured so that it can be presented in a given context, making it useful outside of the person/s who collected it
- Data → Information = Decisions & Actions

Data to Capture + Analyze

- [BEFORE] **SIGN-IN SHEETS** are crucial to collecting data. Suggested data to capture are name, email, phone, and zip code. Leave space to capture data on future interests.
- [AFTER] **EVALUATION FORMS** are a tool to capture how training went from the perspective of the participant. Use evaluations to track what additional trainings participants want to partake in the future.

Event Metrics to Track

- Track total RSVPs
- Track total attendees post event
- Track future sign-ups

STORYTELLING

Telling the Story of Training

While numbers create a specific and quantifiable kind of reporting, knowing how to 'tell the story' of a training can be a useful, strategic tool. **It's an opportunity to create a visual, emotional story of a training.** Like with the data, storytelling is another way to translate information to stakeholders. It creates an emotional and visual narrative of a training that can still include some light, quantifiable information.

Some ways by which to "Tell the Story" of your training:

- Take photos and short videos; these can be included in wrap-up or update and thank you emails, along with some numbers. Sharing these numbers with internal and external partners can be used strategically. [Guidance + tips for capturing photos at an event are included in this manual]
- Develop one-liners you can tweet during the lead-up to the session, just before, and after the training. Have your Twitter handle available in training presentation and on handouts so participants can retweet.
- Consider creating a unique hashtag for the training, and be sure to include it as a footer in the training presentation or handouts so participants know what hashtag to use when tweeting Ex: #DCCCU
- Internally: send a memo around afterwards with details regarding the training session that includes a few photos and numbers on the event; give a shout-out to other teams and staff that supported and participated in the training. If there is a weekly all-staff meeting, briefly "tell the story" of the training.
- External partners: be sure to share the success story of your training with outside partners thanking them for their time and support.

Tell Your Personal Story

The most effective way to move any other person to action—not just sympathy—is telling a story about you, sharing how they fit into the collective, and why *right now* was the moment to get involved. What challenge are we facing? What choice are we making to overcome the challenge? What is the outcome of our choice?

What must all stories have? Below are core elements of a story:

- Characters [Heroes + Villains] Characters we fall in love with, identify with, cheer on or boo
- Plot [Direction/Engaging Purpose] Stories need to have purpose and direction
- Challenge [**CHALLENGE** Conflict] Stories have a conflict where the hero faces a critical challenge or question
- Resolution [**CHOICE** Climax +Consequence] The decision regarding the challenge is made
- Theme [**OUTCOME** Moral + Lesson] What does the resolution of the conflict of conflicts tell you?

READING YOUR AUDIENCE

Training heavily rests in preparation and planning, but ultimately, it is about the audience. Knowing how to read your audience is essential to the goal of training: to train, share knowledge, and skills with others. Below are some tips for engagement and cues for spotting engaged and disengaged participants.

Ask the audience questions at the onset and periodically throughout the session as a way to maintain and reengage participants. Reading the room is also a helpful tool in learning the knowledge and skill level of the room.

- Have an engaging opening question ready and ask a “show of hands” type question. “How many of you have ever...? Raise your hand.”
- Ask open-ended questions that require only the audience to raise their hands to participate

Visual cues from your audience:

- Engaged: nod, smile, lean toward you, take notes, make eye contact, look serious and intent, ask relevant questions
- Disengaged: zone out, lean away, show no expression, cross their arms, check their phones, leave the room, avoid eye contact, have side conversations

USING A "PARKING LOT"

Off-topic questions can distract the intended focus of the session, and prevent you from staying on schedule. Before the training begins, post a piece of butcher paper at the front of the room with the title "Parking Lot." If someone asks an off-topic question, acknowledge it is important, but that it is off-topic for the session. Write the question down so that it may be addressed at a later time. Lastly, be sure to establish at the start of the training when you will be answering questions. Always follow-up with "Parking Lot" topics in order to maintain credibility with your training audience in the future.

Steps to Use the "Parking Lot" Concept:

Explain to participants at the beginning of the meeting to focus on the agenda. Also explain that this rule will help keep the meeting productive and on time.

- Keep the agenda in front of you.
- Follow the agenda.
- Facilitate, monitor, and contribute to discussion.
- When off-topic discussions arise, acknowledge the value of the topic and remind participants that it is not on the agenda. Write it down and include it in the meeting notes. Explain that the topic will be explored at another time.
- Follow-up with parking lot items.

THE DEBRIEF

WHAT? **SO WHAT?** **NOW WHAT?**

Debriefs can help us accelerate learning, innovate new approaches to problem solving, and help us reach our goals. This is more than a casual conversation about what did and didn't work. Debriefing digs into why things happened. As adults, we solidify our learning when we discuss what we just learned! Remember to keep the evaluation and debrief separate because they are not the same thing.

What? So What? Now What? is a model used to critically reflect and process an experience. In this context, it can be used as way to break down the *What? So What? Now What?* of a session: What was covered? What did you learn? So what? How does new knowledge affect you and your team? Why does it matter? Now what? What is the action coming out of the training? What will happen next after learning new skills?

These are the nuts-and-bolts questions that can be used to frame your own *What? So What? Now What?*

Sample Questions:

WHAT?

- What did you learn that was surprising to you?
- What ideas are you going to implement from today's session?
- What specifically did you learn to apply to your program?

SO WHAT?

- What does new knowledge mean to you?
- How does new learning affect you?

NOW WHAT?

- How will you implement new knowledge?
- What action items will be a result of the training?

EVALUATIONS

Always be sure to include an evaluation when facilitating a session. It offers an opportunity for participants to give feedback on what worked, what didn't, and whether key learnings were achieved. As a facilitator, it is a chance to fine-tune your sessions moving forward. Make it clear to participants that a name is not required on the evaluation, and they should feel free to submit it anonymously.

Tips:

- Be sure to have a blank folder available for people to turn them into after completing
- Hand out with any additional materials at the onset of the training, so there is already an expectation to complete and return at the end of the session

Sample Evaluation:

Rate how well today's training achieved our goals: [1 = *not at all*, 4 = *extremely well*]

MISSION AND GOALS
Rate how well the training introduced you to our mission and goals: 1 2 3 4

CONTEXT
Rate how well the training explained the context of your work with the campaign: 1 2 3 4

SKILLS
Rate how well the training familiarized you with tactics we use to pursue our goals: 1 2 3 4

Please rate and evaluate each section of the training.

NAME OF SESSION:	*NAME OF SESSION:*	*NAME OF SESSION:*	*NAME OF SESSION:*
____________________	____________________	____________________	____________________
Facilitation: 1 2 3 4	Facilitation: 1 2 3 4	Facilitation: 1 2 3 4	Facilitation: 1 2 3 4
Context: 1 2 3 4	Context: 1 2 3 4	Context: 1 2 3 4	Context: 1 2 3 4
Comments:	Comments:	Comments:	Comments:

Please give us your feedback on the training overall.

What did you like most about today's training overall?

What should we change for future trainings?

TRAINING PLANNING RESOURCES

Well executed sessions are thought-out, with a lot of attention given to planning and details. Below are some templates that can be used throughout the planning process. You will find a template for the planning stage, as well as templates to organize sessions and staffing needs throughout the training.

Training Plan Template

Name of Training
Date / Location
Goals

1. *Define goal one.*
2. *Define goal two.*
3. *Define goal three.*

Sessions:

SESSION	GOALS OF SESSION	DURATION	OWNER OF MATERIAL CREATION	STATUS OF MATERIALS

Training Plan Example

[Name of Training]
[Date / Location]
Goals:

1. Orientate participants to their roles and expectations
2. Provide basic organizing skills to the field team, and define clear next steps
3. Build team culture across the team

Sessions:

SESSION	GOALS OF SESSION	DURATION	OWNER OF MATERIAL CREATION	STATUS OF MATERIALS
Your Role and Expectations for Field Organizers	Understand your role, and how you fit into the big picture, familiarize with day-to-day responsibilities, and understand expectations of organizers	60 minutes	DCCC	Created
Team Culture and Norms	Learn about existing culture and norms, set norms as a team and build our culture	45 minutes	DCCC	Created
Turf Orientation	Understand how to learn turf, and how to turn knowledge into action	35 minutes	DCCC	Created
Telling Your Personal Story	Understand building relationships through story, and practice telling your story	60 minutes	DCCC	Created
Introductions, One-on-Ones, and the Hard Ask	Define one-on-ones, learn mechanics of Hard Ask, strengthen your Ask	55 minutes	DCCC	Created
Organizing Events	Understand how to organize events, know how to plan, execute, and report on event	45 minutes	DCCC	Created
Volunteer Recruitment and Retention	Understand why people volunteer, learn how to recruit and retain volunteers	40 minutes	DCCC	Created

Sample Agenda

[Note: session titles are in bold, highlighted in red]

DAY 1: WEDNESDAY, MARCH 2
WELCOME AND INTRODUCTION

TIME	SESSION	PRESENTER(S)
12:30	Arrival and getting started	
12:30–1:30	Welcome and ice breaker	
1:30–2:30	**Your Role and Expectations**	Samantha Hernandez
2:30–3:00	Break	
3:00–4:00	**Team Norms and Culture**	Samantha Hernandez Gabriela Reyes-Gutierrez
4:00–5:00	**Turf Orientation**	Samantha Hernandez
5:00–5:30	Debrief and next steps	Samantha Hernandez
5:30–6:30	Continue to work on Turf Orientation	Hilal Al-Maari facilitates

DAY 2: THURSDAY, MARCH 3
SKILL BUILDING

TIME	SESSION	PRESENTER(S)
9:00–10:00	Arrival and ice breaker	Samantha Hernandez
10:00–11:00	Telling Your Personal Story	Hilal Al-Maari
11:00–12:00	**Introduction, One-on-Ones and the Hard Ask**	Samantha Hernandez
12:00–1:00	Lunch	
1:00–2:00	**Organizing Events**	Samantha Hernandez
2:00–3:00	**Volunteer Recruitment and Retention**	Hilal Al-Maari

Staffing Grid

Use the staffing grid to organize everyone supporting the smooth execution of the training.

ROLES:

- **THE PRESENTER** is the person presenting the session
- **THE HELPER** does anything and everything to support the presenter, from passing out handouts, to taking notes on the whiteboard, to placing off-topic questions in the "Parking Lot"
- **THE MODEL PARTICIPANT** is someone in the audience [can be staff] who sits within the audience and chimes in if the group gets quiet or stuck on a question; they also model good participant behavior by not using their laptop or phone, and pay active attention to the training session
- **"RALLY THE TROOPS"** keeps track of time, making sure sessions start/restart on time after breaks; this person ushers people back in so the session stays on schedule
- **THE TIMEKEEPER** is tasked with making sure presenters stay on time, using time-keeping signals [Find time-keeping signals near the end of this manual].

TEMPLATE:

DAY 1: [DATE]

[TITLE FOR THE DAY]

TIME	SESSION	PRESENTER(S)	HELPER/ MODEL PARTICIPANT	"RALLY THE TROOPS"	TIMEKEEPER

Staffing Grid Example

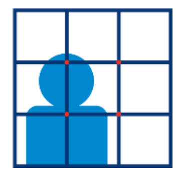
DAY 1: WEDNESDAY, MARCH 2
WELCOME AND INTRODUCTION

TIME	SESSION	PRESENTER(S)	HELPER/MODEL PARTICIPANT	"RALLY THE TROOPS"	TIMEKEEPER
1:00	Arrival				
1:30–2:30	**Your Role and Expectations**	FD: Samantha Hernandez	Regional: Gabriela Reyes-Gutierrez		DFD: Samia Ahmed
2:30–3:00	Break			Samantha Hernandez	Gabriela Reyes-Gutierrez
3:00–4:00	**Team Norms and Culture**	FD: Samantha Hernandez	Regional: Gabriela Reyes-Gutierrez		DFD: Samia Ahmed
4:00–5:00	**Turf Orientation**	Regional: Gabriela Reyes-Gutierrez	Samia Ahmed		Samantha Hernandez
5:00–5:30	Debrief and Next Steps	FD: Samantha Hernandez	RFD: Hilal Al-Maari		Samia Ahmed
5:30–6:30	Work block on Turf Orientation worksheet	Hilal Al-Maari			Gabriela Reyes-Gutierrez
6:30–7:00	Trainers prep for Day 2				

CAPTURING AN EVENT: Tips and Tricks

You might not be a professional photojournalist, but you can be a good photographer—and you don't need a fancy camera! When combined with free apps, today's camera phones are convenient and perform well enough to capture excellent photos. Posting great photos will be important to your storytelling of the event. TIP: consider sending a photo or video in a thank-you follow up note to the attendees. Great photos and videos are also excellent for sharing on social media.

Setting Up the Shot



To "frame" the shot, use the "rule of thirds." Pretend your camera screen is divided into three sections vertically and horizontally and then use the crossing lines to point to your subject. This is especially important for close-ups but can also help frame shots with a speaker and the audience. The primary points of interest on your screen sit along the "third" lines.

Be aware of your environment. Get rid of distracting backgrounds and clutter. For example, avoid trees that look like they are growing out of heads when they are in the background. Change angles to avoid window glares from across the street. Keep that mess well out of the frame of the picture, and you will end with a nicer, less cluttered photos.

Watch the light behind your subject! If the subjects are in front of a window or a lamp, the shot will come out dark. Move to the side or a different angle so the photo will be better lit.

Taking the Shot

Stay away from zoom. Do not use the zoom function. Due to the nature of the camera, the zoom is much lower quality and the shot becomes much harder to keep stable and smooth. Fill the frame with your subject. Get closer to your subject. If your photos aren't clear enough you are not standing close enough.

Get posed photos at the beginning and end. That allows everyone to relax during the event, which will give you the opportunity to capture quality candid shots. Getting both candid and posed photos will give you a larger array of photos to choose from.

Use burst mode! Use burst mode to capture a collection of different expressions, poses, and improve the odds of getting a fantastic shot. The more photos you capture this increase the opportunity to find the best shot to highlight this great event!

ADDITIONAL TRAINING RESOURCES

Time-Keeping Signals	Directional Arrows	Sign-in Sheets

In this section you will find practical resources for your training.

TIME-KEEPING SIGNALS: Use these to provide a subtle, visual reminder to presenters throughout the session. Example: "10 min. Remaining" – "Last Question" – "Stop" Note: sizes are already set to a good "viewing" size, but feel free to adjust as necessary.

DIRECTIONAL ARROWS: Make it as easy as possible for participants to arrive at your session on time. Is the entrance to the parking lot subtle? Once at the location, will participants understand how to reach the space in the building where the training will take place? Are there a couple lefts and then a right? Print out a handful of directional arrows in advance, pack some tape, and be prepared to post signs so that it's easy for those attending the session to understand where they are meant to be.

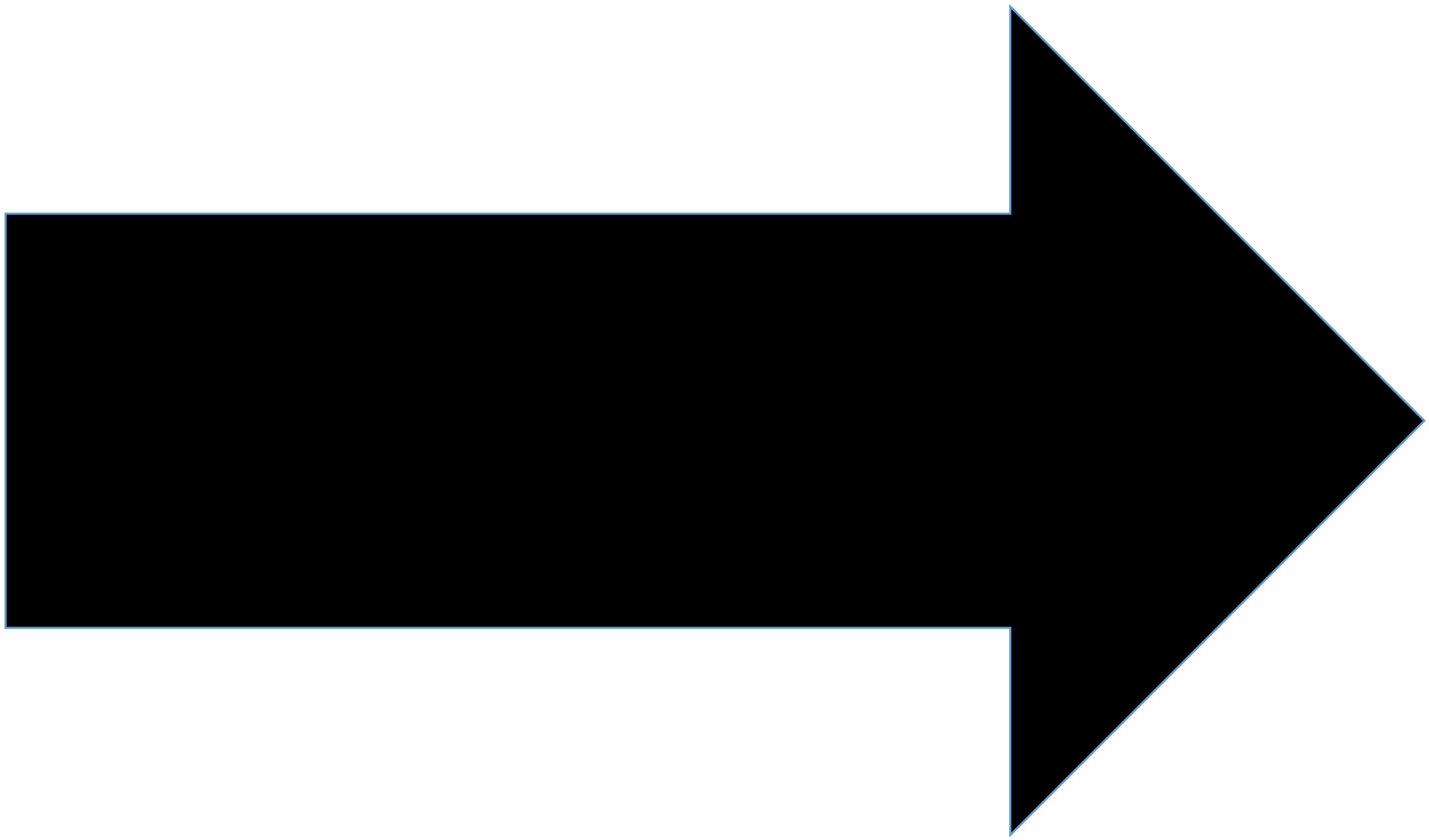
SIGN-IN SHEETS: Sign-in sheets serve a few purposes. You can get a final headcount on who attended for reporting purposes, contact information for your participants, but you can also customize to gather other data you may be looking to capture. In the sample sign-in sheet found in this section, the last column was adapted to capture the roles participants were interested in pursuing.

OTHER: What additional resources will you need?

- ____
- ____
- ____
- ____
- ____

Sign-in Sheet Example

NAME	PHONE	EMAIL	INTERESTED IN
			☐ Phone Bank ☐ Canvass ☐ Attend Training ☐ Other
			☐ Phone Bank ☐ Canvass ☐ Attend Training ☐ Other
			☐ Phone Bank ☐ Canvass ☐ Attend Training ☐ Other
			☐ Phone Bank ☐ Canvass ☐ Attend Training ☐ Other
			☐ Phone Bank ☐ Canvass ☐ Attend Training ☐ Other
			☐ Phone Bank ☐ Canvass ☐ Attend Training ☐ Other



60

minutes remaining

45

minutes remaining

40

minutes remaining

30

minutes remaining

20

minutes remaining

15

minutes remaining

10

minutes remaining

5

minutes remaining

3

minutes remaining

1

minute remaining

LAST

QUESTION

STOP