International Federation of
Library Associations and Institutions

Building Strong Library Associations
Convening Facilitator/ Trainer Manual

Contents

1   Introduction

IFLA's vision for the BSLA Programme

IFLA's vision for the Building Strong Library Associations programme is to enrich society and the library and information profession by building strong, sustainable library associations. The programme helps library associations and their members increase their potential to:

- Improve services for library users
- Provide equitable access to information
- Develop the library and information profession

It is doing this through a series of learning packages and activities that can be customised to accommodate different cultural, political, technological, social and other conditions. The programme focuses on a sustainable and evidence-based approach to library association development, using impact assessment and other methods as appropriate to evaluate the outcomes of training and activities.

IFLA is building on the success of the BSLA programme by delivering convenings at the regional level where participants will be encouraged to think strategically about needs across the region, and in their own countries. Regional collaboration and implementation at regional and national levels will strengthen participation in the international, regional and national development and advocacy agendas to improve the position of libraries.

The convenings will include four days of workshops, practical activities and proposal planning. Materials will be delivered from the BSLA programme, as well as IFLA's policies and guidelines, and focus on how these can be implemented at the national or regional level. During the convening, associations will identify their needs for further activities and development, and form an action plan for implementation.

The convening will be a very interactive meeting involving presentations, group work, discussions, and practical activities to take back to national associations.

Participating associations will have different roles at the convening - some will share experiences and strategies with others, others will benefit from an opportunity to learn from other associations in their region.

What is a convening[1]

A convening is a series of activities – workshops, group work, role plays, poster sessions etc. Participants generally come from a range of organisations or associations, representing different perspectives and experiences on the topic of the gathering. A **clear purpose** is required – in this case, the

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[1] Adapted from page 6 of *GATHER: The Art & Science of Effective Convening* by Anna Muoio and Noah Rimland Flower at Monitor Institute, 2013. Available at http://www.monitorinstitute.com/what-we-think/gather.

development of a proposal for progressing an association priority issue. Participants work together, learning from each other's experience and collaborate to develop insights and outcomes that would not be possible on their own.

The following outcomes are expected from the BSLA convening:

- Reinforce cross-country networks and expertise to support development in the regions;
- Increase understanding and adoption of IFLA policies and manifestos to support high quality library and information services;
- Promote strong, credible associations that effectively represent the sector through improved leadership, governance, partnerships and membership;
- Provide a foundation for sustained development and advocacy.

Participant learning outcomes from the convening

At the end of the convening, participants should be able to:

1. Assess association needs

- Think strategically about the library and information needs of their association, country and region.

2. Understand the landscape for library associations

- Understand the issues affecting associations in their region
- Understand how associations can work together across borders to achieve goals (What is the context for library associations in my region?)

3. Prepare proposals for development

- Identify the priority need for their association, and produce a draft development proposal. (What is the issue?).
- Define the purpose and benefits of the development proposal and identify who will be involved or affected by it. (Why is this important and for whom?)
- Explain what the development proposal is intended to achieve and how to go about it, using a project management framework. (What will my library association achieve and how?)
- Develop an action plan for taking the proposal back to the association and gaining support for it. (How do I gain support for the proposal?)

4. Understand the steps for moving their development proposal forward.

- Understand the significance of partnerships (national/regional/international) and advocacy to improve the position of their library association. (How can my library association obtain support?)
- Ascertain strategies for assessing and evaluating the outcomes of a project or development proposal, whether funded and unfunded. (How will my library association know if a project has been successful?)
- Understand means for ensuring the long-term viability of a project, beyond the life of any funding. (How can my library association sustain the project and its outcomes?)

The facilitator will need to make sure participants understand the intent of the convening and what they are expected to learn. Encourage them to learn from each other.

2 Preparing for the convening

Presenters will need to adapt the material and customise it for the given audience. A convening is typically to run over four days. Suitable local examples will be needed to illustrate key points and to maintain audience interest.

Roles and responsibilities

IFLA will consult with a small informal working group to plan each convening, comprising:

- BSLA core trainers
- Meeting hosts
- IFLA ALP committee members
- Consultants
- IFLA staff

Many attending the convenings will have multiple roles:

Hosts

Meeting hosts and advisors will plan practical logistics for the events and provide local advice (timing of programme, social, breaks, cultural adjustments etc).

Convening Facilitator

Selected by IFLA, the convening facilitators will be responsible for the smooth running of the four-day programme. The convening facilitator will ensure sessions keep to time, deal with unexpected interruptions to the schedule and ensure that content continues to flow in an orderly fashion. It is important that participants understand what is happening and why and the convening facilitator provides any necessary bridges to transition from one stage of the programme to the next. The convening facilitator will also run the review sessions at the start (and finish?) of each day.

Core trainers

Existing BSLA trainers who will be invited to deliver content and activities during the convenings. Trainers will both train participants and facilitate their learning throughout the programme.

BSLA 'alumni'

Past country coordinators, association presidents and emerging regional leaders/trainers who will be invited to deliver some content and support other associations during the convenings. In some cases they may need some train-the-trainer support.

Other BSLA projects

Representatives from ongoing or recent ALP/BSLA projects in the regions who will share advice and support other associations during the convening. These representatives are not expected to deliver content/training activities.

Invited associations

Participants will be invited from associations in the region, at least two from each country to support each other. The most ready and able associations will be chosen, but the representative from each country may not necessarily be the association president but rather someone who can effect change.

IFLA

IFLA staff will participate and deliver content such as plenaries and lead BSLA strategy and implementation discussions.

Skills of appointed trainers/facilitators for the convening

Trainers/facilitators who involved in running a convening are required to have significant national association experience and the ability to put their knowledge into practice through training. They should also ensure that they have adequate time prior to the workshop to spend on the preparatory tasks.

Selection of participants for the Convening

The selection committee will comprise members of the IFLA ALP committee, and representatives from the regions where the convenings will take place. Applications will be shortlisted by the selection committee against the selection criteria. A member of the selection committee may contact applicants where they need to clarify any part of an application.

Selection criteria

1. <u>Readiness</u> to carry out the project: the library and broader social/political/economic environment is receptive to library development

2. <u>Ability</u> to carry out the project: The association has the capacity to implement the project. Projects are selected for success and likely impact

Additionally, participants should have:

1. Demonstrated, current active leadership within their national or regional association; together with standing and influence within the profession at a national and/or regional level

2. A depth of understanding of issues that have a current or expected impact on the library and information services sector on a national, regional and global level

3. Demonstrated relevant knowledge and experience to develop the capacity of their association

4. Proven ability to build networks and professional relationships

5. Proven ability for creative thinking and innovative ideas; results motivation

6. Strong written and oral communication skills, including negotiating skills

The learning environment for the convening

The learning model for the BSLA Convenings is designed to embrace

- Innovation
- Collaboration
- Engagement

These principles inform the learning design for the convening. The Convening design is aligned with the BSLA vision (see page 3 of this document) and IFLA's strategic directions.

Participants are encouraged to learn from each other in small and large groups, have the opportunity to apply new knowledge and ideas through worked examples, reflection and practical application to their own situations.

As a result of participating in the convening, participants will have developed or honed their skills in networking and collaboration. This will be accomplished through a range of activities including small group work, brainstorming, workshops and peer review.

The number of participants attending the convening will be limited to 30-40 people. The Convening programme is an intensive one, which provides an encouraging and supportive environment where participants have the opportunity to develop and practice their skills through professional presentations and the coordination of group learning activities.

3   The structure of the convening

The convening has been developed as a four day face-to-face programme. The programme focuses on the following:

- BSLA and IFLA resources that have been of most interest in BSLA work to date
- Principles of adult learning
- Professional presentations and group learning activities

Convening materials

The Convening materials comprise:

- Convening Session Content Notes: These comprise a programme summary and a complete set of notes for each session, including activities.
- Slides: A complete set of PowerPoint slides to be used to support presentations.
- Annexes: All templates and handouts used in the sessions will be consolidated in the annexes.
- Facilitator/Trainer Manual: (this document) An overarching document that provides guidance for convening trainers/facilitators.
- Case studies: ILFLA has a bank of relevant case studies that can be used to support sessions. These are being continuously developed but a bank of current case studies can be found online at http://www.ifla.org/bsla/

Strategies for running the convening

In planning for the convening, the appointed trainer/facilitator should have the support of five-six trainers and any appropriate local staff, to help them at the event.

IFLA will initiate contact with all the participants to ensure that the pre-reading and preparatory materials are distributed. Participants will be required to consult with their associations and complete the convening invitation.

It is recommended that the appointed facilitator/trainers are fully prepared to deliver the workshop. They will need to:

- Read through the manual carefully
- Preview the slides and the additional information in the annexes before the workshop
- Consider ways to share their own experiences of working with library associations

Trainers/facilitators should focus on the desired learning outcomes for the workshop as a whole and for the individual sessions. **It is important that all participants understand how the learning activities contribute to the achievement of the learning objectives.**

Trainers/facilitators are encouraged to **customise** the training materials to suit the local conditions, **specifically in terms of language, culture, business and social factors.** This may involve:

- Developing a good understanding the context of the country or region where the convening will be held, even if it is their own
- Determining which materials will be needed for the specific group of participants
- Identifying local problems or groups with special needs that should be emphasised in the convening
- Adapting the contents to fit with the local culture
- Localising the examples and case studies that illustrate practice in the immediate country or region
- Trying to make the convening enjoyable and memorable. People learn best if they are having fun

Post-convening activities

The convenings mark the beginning of two years of activities, culminating in a global convening in 2016 which will bring together selected associations from all three regions.

Associations will:

- Identify ways to collaborate with other associations participating in the convening, and initiate collaboration after the convening
- Develop a project proposal to be submitted to IFLA or another organisation
- Have the opportunity to apply for project funds from IFLA
- Formally report to IFLA on progress against association and regional action plan six months after the convening

4 Adult learning principles

Trainers will need to be aware of the socio-cultural differences that may have an impact on adult learning; people in different cultures may have had quite distinctive learning experiences. Features of adult learning are as follows.

- Adults are autonomous and need to be self-directed.
- Adults learn in different ways:
  o Visual – learning by reading, seeing etc
  o Aural – learning by listening
  o Kinesthetic – learning by doing
- Adults vary in their learning preferences:
- Some need to have a global (big picture) overview up front
- Others need information to be built up in a linear (step-by-step) view
- Adults have professional and life experiences to bring to the learning situation - it is important to identify ways of connecting this to the learning activities
- Adults are generally practical and will focus on what in the workshop relates to the outcomes they are looking for. Relevance is important
- Adults need to be shown respect - for their professional experience and to acknowledge their cultural differences.

Surface and deep learning

Various theories of learning often refer to the work of Benjamin Bloom (1956) who developed a taxonomy of cognitive domains which ranged from 'surface learning' to 'deep learning'. Surface learning is associated with memorising and general technical competence, i.e. the cognitive domains of remembering, understanding and applying the skills and knowledge, while the process of achieving deep learning involves the cognitive domains of analysing and evaluating information acquired to then be able to synthesise or create new forms of knowledge (Figure 3.1).

Deep learning

Surface learning

Creating
Evaluating
Analyzing
Applying
Understanding
Remembering
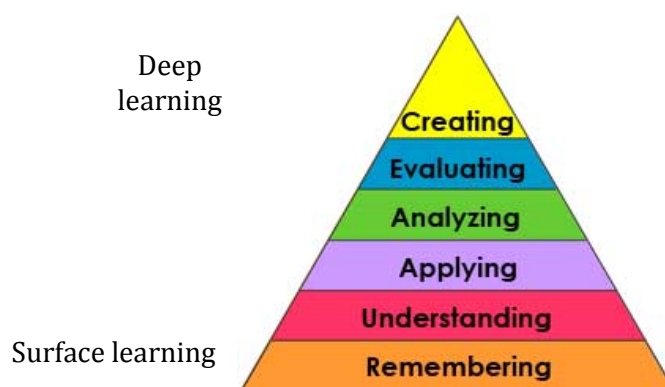
Bloom's taxonomy of cognitive domains
(revised by Anderson & Krathwohl, 2001)

Participants will need to achieve 'deep' learning outcomes so that they:

- Understand the meaning of the material
- Can integrate it into their existing ideas and understandings
- Are able to reconsider and alter those existing ideas and understandings if necessary
- 'Interfile' new knowledge for future access.

Motivating adult learners

Trainers need to take into account the general principles of adult learning as well as the need to accommodate different learning styles. This means that there needs to be:

- Variety in structure and activity
- Learning to achieve personal development is important, as well as learning for its own sake
- Learning which is related directly to the outcomes that the participants are seeking
- Appropriate levels of difficulty and cultural contexts
- Open feedback on contributions from the participants
- Understanding on the part of the learners about how they will use their learning when they return home
- Opportunities for the development of collegial networks as an outcome of the training.

Learning activity overview

The convening programme includes group learning activities and presentations. Activities such as training and facilitation are regarded as common approaches to group learning and in this programme a training approach is required for presentation sessions and facilitation skills required for group processes.

Please note: trainers will need to employ a combination of facilitation and training skills and apply them as appropriate.

Training

Organised activity aimed at imparting information and/or instructions to improve the recipient's performance or to help him or her attain a required level of knowledge or skill. Presentations and overviews fall in to this category.

Facilitation

Activity whereby a person structures and manages the group process to help the group meet its goals.

It is likely that most participants will have had the experience of training, while facilitation may be a fresher concept. The presenter should summarise

the positive experiences that the participants share through the discussion, stressing the powerful aspects of group learning activities, such as:

- The collaborative efforts of groups usually produce better results than individual efforts
- Group participation and involvement can increase productivity
- Everyone has a chance to be influential, and people sense that they are part of a team effort
- Innovation, problem-solving and implementation skills are developed
- Passive attitudes, such as 'Just tell me what to do', are less likely.

It is important to stress the value of collaboration and involvement in the context of the BSLA programme.

Presentation skills and tips

A presentation is an activity conducted by a resource specialist to convey information, theories or principles. Forms of presentations can range from straight lecture, however long or short, to some involvement of the learner through questions and discussion. Presentations depend more on the trainer for content than does any other training technique.

Things to be aware of with presentations

- Emphasises one-way communication
- Learner's role is passive
- Learner retention is not great unless it is followed by practical activities

Process

- Introduce the topic—tell the learners what you're going to tell them
- Tell them what you want to tell them—present the material using visual aids
- Summarise the key points you've made—tell the learners what you've told them
- Invite the learners to ask questions

The presentation itself

- Speak slowly – a little less slowly than you think you need to
- Make the presentation a dialogue with participants – a collegial approach is appropriate, dispelling any notions of the presenter as 'authority'
- Display your enthusiasm and passion for the topic
- Check participants for engagement with your presentation: pause and ask if people appear not to understand, or ask for ideas or examples on a topic to check understanding
- Be sure to provide an overview so participants know what will be covered and after presenting the content, review what has been covered. This reinforces learning

- Use examples to illustrate points – especially from your own association
- Three or four main points should be the focus for a 20 minute presentation
- Encourage questions and tell participants whether you prefer them during the presentation or at the end

Facilitating Discussions

The key to facilitating effectively is to remember that your role is to lead the discussion, not direct it.

- K**eep your own contributions during group discussions brief.** Let participants respond to questions and to one another first. If they answer a question completely, you, the trainer, need not add additional information.
- **Encourage the participation of people who have been quiet.** One way to do this is to state the participant's name first and ask the participant an opinion question with no correct answer. You can avoid putting the participant on the spot by asking a question you know she or he can easily respond to.

Asking Questions

- **Use open-ended questions that encourage answers beyond yes or no.** Closed question: Did you like the training? Open-ended question: What did you like about the training?
- **Use "think back" questions.** When trying to engage participants in a discussion about their experiences, ask them to remember their past instead of imagining a hypothetical situation.
- **Ask clear and concise questions.** Make sure your questions only cover one issue at a time.
- **Avoid asking "why."** Instead of asking someone why they believe something, try asking them what experiences led them to that conclusion, to give examples, or other strategies that will help draw out more information.

Answering Questions

One of the most common questions you will ask is, "Does anyone have any questions?" If, in response, you are asked questions you think the group can answer, redirect them to the group to encourage active learning. If you are the only person who can answer the question, use the following tips:

- **You're asked a question that you can't answer.** Just say you don't know or ask to get back to the person later.
- **You're asked an extensive question.** Break the question down into smaller parts and keep your answer as concise as possible without omitting key details.
- **You're asked a controversial question.** This is good, it means people are thinking critically. Take your time in answering, don't be pressured into saying anything you don't mean.

Sensitive Topics

Introducing sensitive topics is one of the most challenging aspects of facilitation. The following tips can help you prepare the participants and maximise their sense of safety discussing the issue.

- **Address the issue from the beginning.** Do not surprise participants with a sensitive topic and acknowledge that it may be harder to talk about the topic than ignore it. Letting people know that the training will delve into sensitive areas can help participants prepare.
- **Pick an ice breaker that really encourages trust.** Low physical activity ice breakers, like sharing the origin of one's name, can help keep the energy at a calm and thoughtful level once the sensitive topic is broached.
- **Gradually build up to sensitive discussions.** Do not attempt to engage the participants in a sensitive discussion with the first question. Groups need time to get to know each other and form trust.
- **Be prepared to change plans.** If participants are very upset or are simply not responding, you may have to change your plans. When participants are not responding try rephrasing the question or asking a slightly different question.

Group learning activities

Convening activities are designed to enhance learning and collaboration across associations and borders. Participants will work in groups of approximately 6 people. Encourage them to learn from each other.

Please note: Where it is important for the outcome, activities in the convening programme indicate how participants should be grouped. At times, **cross country** or **cross regional** groups are suggested for group work. For other activities, groups are to be allocated according to **issues of common interest**; these can be identified from their convening application forms and groups could be pre-assigned from this information. When asked to work on their own association development proposals, **association pairs** should work together.

There are a number of positive aspects of group work:

- Participants are encouraged to become 'active' rather than 'passive' learners
- Critical thinking is encouraged
- Collaboration, teamwork and team skills are encouraged
- Participants learn from each other – learning becomes collegial
- Learning becomes participant-focused
- Alternative ideas/approaches can be explored
- Learning outcomes are more likely to be achieved.

Tips for group learning activities

Group discussions

- Different people will have different opinions on a topic
- Ensure that people don't interrupt others
- Encourage as many people as possible to have their say
- You may need to encourage some people to contribute
- You may need to end the discussion if one person starts to dominate, or if the discussion becomes heated
- Use lots of follow-up questions:
    - 'Can you tell us more about why you think that?'
    - 'Can you give an example of that?'
    - 'Who else has an opinion on that?'
    - 'Why do you think that this is such an important issue?'
    - 'Who can think of another way of tackling the problem?'
    - What would happen if we didn't do anything about this issue?'

Goals for collaboration

The trainer should continue to focus on the positive dimensions of collaborative work in group learning situations. Ideally, collaboration should result in group members who are:

- Actively involved
- Feel useful
- Feel their ideas are valued
- Building trust and cohesiveness

These goals for collaboration can be seen to also relate to the goals for effective facilitation:

- To make the work of the group easier
- To help the group members discuss issues
- To encourage the group members to share ideas and experiences
- To guide the group to set and achieve identifiable results
- To help the group members feel involved and useful – that it was not a waste of their time!

Understanding facilitation

Facilitation is about something that gets done, rather than what you do; it is about the process, as well as the task. When we work with people, we need to be aware of the 'iceberg'.

Above the surface we encounter the conscious and visible aspects of a person's actions and behaviours. Below the surface, however, there are all the unconscious aspects of a person – their feelings, relationships, beliefs, fears, prejudices etc. These are not visible, but they are a vital part of the way a person thinks and interacts with the world around them. The subconscious dimensions are especially important in cross-cultural training situations.

Responsibilities of facilitators

Some of the responsibilities of facilitators include:

- To ensure balanced participation
- To encourage dialogue amongst participants
- To provide structure and process for group work
- To listen actively – and to ask others to do the same
- To encourage different points of view
- To record, organise and summarise input from group members
- To move the group through stages of group decision making and consensus
- To help the group resolve conflict in a positive and productive way
- To guide the group to identify cross-cultural or geographical differences that might have an impact, and to help them discover ways to deal effectively with these challenges
- To capitalise on differences among group members – for the common good
- To protect group members and their ideas from attack or from being ignored
- To emphasise that the group is a reservoir of knowledge, experience and creativity – and to tap this resource
- To encourage the group to evaluate its own progress and development

In the IFLA BSLA Convening, the goal is to facilitate the group to achieve specific learning outcomes, so that the individual members of the group:

- Become familiar with the content
- Feel competent and empowered apply it to the development of their proposal

The role of the facilitator is therefore not to teach, but to:

- Listen
- Support
- Summarise
- Challenge
- Lead the process
- Create a safe environment
- Trust the group (ie let go!)

Ideally the group will want to own the content – the 'what' – while the facilitator owns the process – the 'how'.

Symptoms of a training session in trouble

It may be helpful to note the symptoms of training sessions that are not conducted as well as they could be, to make sure that these conditions are avoided (Cowan, 2006[2]).

- The session doesn't start on time
- The trainer/facilitator doesn't review the workshop/seminar objectives with the participants (therefore they are not certain of the training session's purpose/benefit)
- The participants sit for long periods of time, listening to information, without any involvement in learning activities (e.g. discussion, group exercises)
- The trainer/facilitator reads from the manual and rarely looks up to make eye contact
- The trainer/facilitator doesn't know how to use the equipment
- The trainer/facilitator doesn't appear to know the material well
- The discussions during the training consistently get off track, but the trainer/facilitator doesn't refocus the group
- The trainer/facilitator doesn't give effective directions for the activities (i.e. clear, complete and timely directions)
- During discussions or activities, the trainer/facilitator doesn't provide participants with any feedback to let them know they are on track
- The trainer/facilitator interrupts participants when they are speaking
- The participants *look* confused, but the trainer/facilitator does not notice or respond
- The participants state that they *are* confused, but the trainer/facilitator doesn't respond adequately

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[2] Cowan, S. (2006). Be a star facilitator or presenter of training: A performance support handbook. Amherst, MA: HRD Press.

5 Case studies

A case study is a written description of a real or hypothetical situation that is used for analysis and discussion. [3]

Uses

- To discuss common problems in a typical situation
- Provides a safe opportunity to develop problem-solving skills
- To promote group discussion and group problem-solving

Advantages

- Learner can relate to the situation
- Involves an element of mystery
- Learners are involved

Things to be aware of before using a case study

- The case must by closely related to the learners' experience
- Problems are often complex and multi-faceted
- There is not always just one right solution
- Requires a lot of planning time if you need to write the case yourself
- Discussion questions need to be carefully designed

Process

- Introduce the case
- Give learners time to familiarise themselves with the case
- Present questions for discussion or the problem to be solved
- Give learners time to solve the problem/s
- Have some learners present their solutions/answers
- Discuss all possible solutions/answers
- Ask the learners what they have learned from the exercise
- Ask them how the case might be relevant to their own environments
- Summarise

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3 Adapted from: Quality Assurance Medical Research Institute. Training techniques.
        www.mri.edu.eg/artic_dr_nabil/Article-4b%20Training%20methods.doc

6 Running the poster sessions

Description and Process

A series of concurrent workshops allows participants to actively engage with specific topics from the BSLA learning modules in an informal way. Each workshop covers a set topic through a series of posters. Posters provide content in a manner that is easy to digest and gives participants key messages to take away. Participants are issued with a worksheet for each topic which asks them to reflect on various aspects of the topic and to apply the concepts to their own situation.

Uses

Poster sessions provide a change of pace in the convening programme. They allow participants to move around, be physically active and to collaborate in different ways.

Advantages

These informal sessions provide variety and should be fun. Furthermore, they encourage participants to explore concepts in less structured ways.

Things to be aware of

Trainers/facilitators should ensure that participants use their poster session time wisely. They should ensure that participants are focused on the key concepts and the questions posed on their worksheets for each poster and that they reflect on the session outcome as outlined on their worksheets.