



MONITORING BUDGET IMPLEMENTATION TRAINING WORKSHOP: GENERAL FACILITATION NOTES

EDUCATIONAL APPROACH

The IBP Monitoring Budget Implementation Training Workshop uses participatory learning principles and techniques. The learning experience is treated as a process in which participants draw on their own prior knowledge and experience, are introduced to new knowledge and skills, and have ample opportunities to test and apply their learning, reflect on what they have learned, and adjust and consolidate their learning.

In facilitating the workshop, the following practices should be observed:

- Encourage active and equal participation.
- Allow participants to share and draw from their prior knowledge and experience, and link them to the learning taking place.
- Give practical examples of new concepts and information whenever possible.
- Provide ample time for participants to complete exercises and activities. This is where learning is being internalized and owned. Don't be tempted to skip tasks or applications, as you may be leaving out a vital link in the learning process.
- Recognize that learning is consolidated through reflection, revising, and recapping. Don't leave out these parts of the sessions.
- Fun games and ice-breakers allow participants to stay energized and engaged. Even when the educational content is not "serious", the aim is for participants to still learn something indirectly about the main themes of the workshop.
- Resist the temptation to rush. The timings provided for the various inputs and exercises have been tested with groups around the world. It is possible to complete some of these activities faster, but this is not necessarily educationally effective. Participants need time to internalize and consolidate what they learn.

- Be aware of saturation points. Participants are exposed to a great deal of new information and skills during the workshop. Use regular evaluations (see below) to gauge how the learning process is working – and be willing to adjust and revise if necessary.

POLARUS SIMULATION ACTIVITIES

The workshop is designed around an extended simulation in which all participants adopt citizenship in the fictional country of Polarus for the duration of the training. Tasks and activities using scenarios and data from Polarus are spread throughout the modules. The focus on a fictional context allows participants to learn certain generic concepts, methods, and skills without concentrating on their own country contexts. This means that participants from different countries can share in the learning process together. However, it is also essential for participants to be able to apply what they have learned “in Polarus” to their own country contexts. At various intervals during the course of the workshop, participants will therefore have opportunities to step outside of the Polarus simulation and reflect on their real budget advocacy projects and the challenges of their own specific contexts.

THE FACILITATION TEAM AND HOST FACILITATOR

The Monitoring Budget Implementation Training Workshop is best facilitated by a team of trainers. Due to the length and intensity of the workshop, it makes sense to divide the eight modules up among the members of the facilitation team and to provide back-up and support to one another as required. It is recommended that one of the team is identified as the Host Facilitator for the duration of the workshop. It is the role of the Host Facilitator to hold the overall flow of the workshop together. The Host Facilitator is typically responsible for:

- Facilitating Module 1, which includes the welcome and introductions;
- Making announcements and acting as the general on-site contact person for the workshop participants;
- Coordinating and introducing the participants when they present their organizations and the budget work that they do.
- Leading the reflection sessions scheduled at the end of several days, when participants are asked to apply their learning to their own budget advocacy projects and country contexts.
- Facilitate the final presentations, as well as the certification, evaluation, and closure of the workshop.

The Host Facilitator could also be responsible for leading any of the other modules, depending on what the facilitation team decides.

REGULAR EVALUATIONS

The formal evaluation of the workshop is discussed with participants in Module 1, at which time they also receive evaluation forms to complete as the workshop progresses. (See Module 1 for more information). In addition to the evaluation form, regular informal evaluation sessions should take place on some evenings. For example, evening evaluation sessions could be planned for the second, fifth, and seventh days. In preparation for an evening evaluation session, ask a few participants a couple days in advance to volunteer to solicit feedback and suggestions from the other participants and to pass this feedback on to the facilitators at their evening meeting.

Such feedback may be about the content of the modules, the facilitation, the level of participation, workshop materials, logistics, and/or administration. In this way, problems are quickly identified and possible solutions can be examined and implemented by the facilitators. One option is for the feedback team to wear badges on the days that they will be gathering participants' comments.

On the days when no evening evaluations are scheduled, other tools can be used to maintain an open flow of communication between the participants and facilitators about the learning experience. For example, create a "Mood Meter" by posting three sheets of flipchart paper on a wall in a public space, close to the exit of the workshop room. Each sheet of paper should have a drawing or symbol at the top that represents a different emotional state or mood – for example ☺ ☹ ☹. Each symbol should be drawn in a different color, e.g., green, yellow, and red. Then provide participants with green, yellow, and red stickers and request that they place their stickers onto the flipchart paper that matches their mood at that point in the workshop.

ENERGIZERS

The Monitoring Budget Implementation Training Workshop is an intensive learning process. Participants are expected to take in a great deal of information and interact extensively with others. As a facilitator, you will be tuned into the energy levels of the group and be able to assess when participants are struggling to learn because they are too tired, distracted, or saturated.

Be aware of training overload and use breaks and energizers whenever appropriate to create pockets of rest or to stimulate energy in the group. Some suggestions are listed below.

Energizers for tired groups who need some rest:

- After lunch or if they are tired, let participants sleep on their arms for 2 minutes.
- Get participants to close their eyes and maintain a minute's silence. This is very useful during the budget calculations session – some people can get very agitated while trying to perform these calculations.
- Ask them to close their eyes and to keep their bodies absolutely still for 1 minute.

Energizers for groups sitting still for too long:

- Talk the group through a light stretch. Be careful of injuries! Ask the group to stretch up towards the roof as far as they can. Then ask them to bend forward as far as they can. If people find this hard, let them hold on to the chair/desk in front of them.
- Ask the group to go for a short, silent walk – no talking allowed.
- Let the group stand in a row and put their hands on the shoulders of the person in front of them. Then ask them to massage the shoulders in front of them. Next ask them to turn around and massage the shoulders of the person that has just massaged theirs.

Energizers for groups who need a spark of mental energy:

- If you are near a library/bookstore/office, ask the group to each grab a book/magazine and to read quietly for 5 minutes. Afterwards they should each share one interesting thing that they read.
- Find something short and inspirational to read. Read it to them and/or give them copies to read and reflect on silently. Some examples below:

Martin Luther King: “The hope of a secure and livable world lies with disciplined non-conformists who are dedicated to justice, peace and brotherhood.”

Nelson Mandela: “For to be free is not merely to cast off one's chains, but to live in a way that respects and enhances the freedom of others.”

Gandhi: “Live as if you were to die tomorrow. Learn as if you were to live forever.”

Margaret Mead: “Never doubt that a small group of thoughtful committed citizens can change the world; indeed, it's the only thing that ever has.”

Alice Walker: “The most common way people give up their power is by thinking they don't have any.”

ADDITIONAL ENERGIZERS

The following energizers can be used at any time to invigorate concentration and energy levels, to get participants up and moving, or just to have a fun break.

How Much Would You Pay?

- **Aim:** to offer a fun break and boost participants' confidence in working with budget data.
- Stand in a circle with all of the participants. Hold up an everyday item that you have brought to the session, one that would be available in all of the countries where participants are from — for example, a loaf of bread, a can of Coke, a bag of rice, a packet of crisps, etc.
- Present the item and pass it around the circle. When each participant holds the item in their hands, they should call out how much it would cost in their country, stated in their own currency. Go all the way around the circle, giving everyone a chance to call out an amount.
- Then go around the circle again and ask everyone to state their amounts in U.S. dollars or the currency of the country where the training is taking place. If there is time, compare the amounts, and note where the cost of the item is the highest and lowest in comparable terms.
- Assure the participants that none of the budget calculations they will learn will really be more difficult than the ones they just did in their heads. As the participants have just demonstrated, they can all work with financial data already!

Counting by Intuition

- **Aim:** to break the heavy pace and serious concentration with a fun and “mindless” activity, while also getting the participants out of their seats to get blood flowing and revitalize their mental energy. In a subtle way, this activity also creates an environment in which the participants must cooperate as a team.
- Invite the participants to stand in a circle with you. Ask them to close their eyes. Emphasize to the group that this exercise will work only if everyone keeps eyes closed.
- The task of the group is to count from 1 to 10. Every number is to be called out by someone in the group. As they have their eyes closed, there is no way of knowing who will call out which number. The idea is to trust the collective timing and spontaneity of the group.
- Begin immediately by calling out “1” yourself. Wait for someone to call out “2” and someone else to call out “3” and so on until they have reached 10. Somehow groups always “intuitively” make it from 1 to 10, very seldom with more than one person speaking at the same time.
- If the group does this very easily, challenge them to count up to 20 or even higher.

Categorize Yourself

- **Aim:** to revitalize concentration and get participants moving.
- Ask participants to stand. Lead them to a part of the room where there is space to move around.
- Explain that just as budget information can be grouped and classified in different ways, so too can the participants themselves. Instruct them to move as quickly as they can in the space available to form groups based on the following “categories,” as you call them out:
 - Attach yourself to everyone who shares the same gender as you.
 - Attach yourself to everyone who is wearing the same color as you.
 - Attach yourself to everyone who lives on the same continent as you.
 - Attach yourself to everyone who is a citizen of Polarus.
- If appropriate, you can also call out some categories that are less obvious to the naked eye and that will require the participants to do some quick “research.” For example:
 - Attach yourself to everyone who shares your favorite color.
 - Attach yourself to everyone who shares your taste in music.
 - Attach yourself to all of the other left-handed or right-handed people in the room.
- After about eight minutes of moving around, invite everyone to take their seats again.

Getting in Line

- **Aim:** to break the content-heavy tone of the session, get the participants moving around, revitalize their mental energy, and counteract any feelings of lethargy.
- This energizer can be performed with the entire group of participants or as a competition among the Polarus CSO groups.
- Ask participants to arrange themselves in a line as quickly as they can, according to their birthdays. One end of the line will be January 1 and the other end of the line will be December 31. Remind them that it doesn’t matter how old they are: this is about the months and days on which their birthdays fall.
- If you have asked each Polarus group to form its own line, award a prize to the group that could get in line the most quickly.
- If there is time, introduce other criteria for lining up: for example, alphabetically by first names, alphabetically by country of origin, from tallest to shortest, etc.

The ABCs of Budget Advocacy Work

- **Aim:** to provide a break from the heavy concentration on budget calculations and revitalize the participants' energy.
- Have the participants stand with you in a circle. Explain that you will begin with A and work through the alphabet. For every letter, someone will say a word that begins with that letter and that is also part of the vocabulary of budget advocacy work.
- Starting with A, you might say "audit." Ask the person on your left to continue with "B" and then continue going around the circle until you have reached "Z."

Hot Chocolate

- **Aim:** to stimulate the participants' energy and get them out of their seats.
- Introduce some kind of prize, like a chocolate. Throw the chocolate to a participant. Explain that when you catch the chocolate, you have to call out the name of a country.
- If someone can call out the name of the currency in that country, then you have to throw the chocolate to the person who called out the right answer.
- The game continues until no one knows the name of the currency, at which point the person holding the chocolate gets to keep it. Just to make sure they are not bluffing, the winner should tell everyone the currency before they open their prize!
- It may be wise to have a few chocolates ready, in case the prize is won quickly each time.