**Field Guide: Knowledge Transfer—Developing Field Guides, Lesson Plans, and Workshops**

**Tim Magee**

<https://csd-i.org/>

**Workshops**

The implementation of your project will take many forms. There may be an infrastructure component if your organization is building a bridge or a school building, but frequently, projects begin with meetings, classroom instruction, field instruction, and workshops. This chapter uses the term workshop to mean a range of types of meetings. A workshop represents the interface between transferring ideas and knowledge between you and your community members. Starting a farmer field school, facilitating a needs assessment, or teaching families how to grow a range of nutritional fruits and vegetables all fall within this chapter’s definition of workshops.

There are three types of workshops in this chapter that represent three different stages of project development. Those designed to gather information about the community in a participatory manner, those meant to present an overview of a topic to community members, and those designed to be strictly for training community members to do a single activity. You can adapt these workshops to your project theme for use at the appropriate stage of your project.

**Knowledge Transfer**

Integral to these workshops is the concept of transferring knowledge. The knowledge to be transferred in community-based adaptation needs to be a two-way transfer. You used this idea extensively in the initial community needs assessment—and again in the vulnerability assessment.

In your project, you may choose to have an agricultural workshop to learn about your community’s traditional agricultural strategies. A week later, you might return for another meeting to share with the community a few improved agricultural techniques that would be in support of their traditional strategies. By having this two-way communication you can begin forming the process of building bridges across which knowledge can pass and action can begin.

A second element in knowledge transfer is that the exchange of information should ideally be between people that are culturally similar to each other. It could be challenging for a highly specialized university professor from Europe to enter a remote village of subsistence farmers in order to share their scientifically-based information about modern agriculture. A better strategy perhaps, would be for her knowledge to pass through several layers of people—somewhat culturally filtered along the way—and to then be presented to the community members by someone who's more culturally akin to them than the university professor would have been.

Experts and remote, rural community members have different positions and expectations. Bridging these requires mutual understanding—understanding that can be complicated by language, culture and experience. Field staff that come from a culture similar to the community members can bridge a number of gaps including expectation, language, cultural acceptability, educational levels, trust and capacity to adapt to new techniques.

**Field Guides for Workshops**

I will start preparing for a workshop by developing a short, concise, one-page field guide that helps me in a number of ways. It allows me to compile how-to information from diverse sources into a guide that best fits my context. It also gives me the basis for a lesson plan—and a single-sheet handout with the field guide printed on one side and illustrations printed on the other. A three-quarter page guide also limits how much I can accomplish in a workshop. It forces me to concentrate on a single specific activity that I can present in two or three hours. Examples of specific activities could include:

* the importance of hand washing and the correct way to wash one's hands
* using point-of-use water filters
* how to build a compost pile for a family garden
* how to dig a garden bed and plant seeds

|  |
| --- |
| **Researching and writing a field guide**  Here are simple steps for developing a field guide.   * Clearly identify a discrete challenge that you’re hoping to address. * Select an activity from your logframe that will address the challenge. * Search the Internet for manuals and handbooks describing how to implement the activity successfully. * Refine your search by seeking peer-reviewed papers to determine the evidence-based effectiveness of the different approaches found in the manuals. * Choose an activity that shows strong evidence of solving the challenge in your community's context. * Write a short one-page summary field guide on how to implement this discrete activity in a workshop. * Illustrate a how to card to hand out to workshop attendees. * Copy and paste sections of your one-page field guide into a workshop lesson plan for conducting a community workshop. |

What I do when I am producing a field guide is that I will read the available literature on an activity—peer-reviewed scientific documents as well as handbooks and manuals. I will then look at the adaptive capacity of my community as well as their traditional knowledge and I will begin to narrow down my choices of step-by-step workshop exercises and activities.

For example, let's look at a farmer soil and water conservation program. That would be rather difficult to present in a half day workshop. However, breaking it down into discrete activities, you might be able to assemble a series of 12, four-hour workshops given once a month which when added together will become a complete farmer soil and water conservation program. These workshops could be reinforced throughout the month with follow-up field visits.

Your first workshop could be a four-hour participatory mapping exercise so that your farming community can identify what soil and water challenges they are facing—and how serious they are. The map will also give them a baseline starting point from which they can improve. The second workshop could be on simple field tests for determining soil quality, and the third workshop could be on the importance of adding organic material to the soil in their fields.

Having made that decision, my next step would be to make technical and cultural decisions that would be appropriate to my farmers’ context, and I would outline a workshop using the activities that I selected from the handbooks that I reviewed (in this case handbooks on participatory mapping). I would then write a three-quarter page summary of the step-by-step process of how to facilitate the workshop.

**Drawing a How-to Card**

Next, I would draw a series of very simple line drawings illustrating the techniques found in the summary and would print those up back to back with the short field guide into a single sheet handout. Drawings and illustrations should be appropriate for and familiar to the community members. One suggestion is to make simple sketches of what you would like to have on your how-to card—and then have one of the community members draw them up properly. This can help ensure that the illustrations are meaningful to the course participants. People in the illustrations will be wearing the appropriate clothing, and houses and fruits and vegetables will be contextual. If they're left as black-and-white drawings they can be photocopied inexpensively.

**Writing a Workshop Lesson Plan**

I would then copy and paste from the three-quarter page summary into a lesson plan that would guide me through leading the workshop. The step-by-step lesson plan will have a specific schedule and detailed exercises and activities. The lesson plan will also focus on two-way communication.

Why write a lesson plan? The lesson plan will help keep you on track and on time if distractions happen in your workshop. You can always look back at your lesson plan to see where you were and what your next step should be. Plus they represent for your organization the opportunity of replicability: if your project is successful, your organization may well want to replicate it in other communities. If you have a field guide and a lesson plan for a successful activity, theye could be shared with your teammates so that they could quickly get to work as well.

**Preparing for a Workshop**

I would begin organizing a workshop itself two weeks or more in advance. Make sure that you have all of your materials together—like large sheets of paper, and pens and markers for drawings. If the workshop is longer than two hours you may also need to plan snacks, drinks, or a lunch.

Have two to three colleagues accompany you to help. This will be especially useful if you decide to break the participants down into sub-groups (for example, of men and of women, or of teenagers and of parents). If you are considering providing snacks, drinks or a lunch, put someone in charge so that you aren’t distracted with the details and are free to focus completely on facilitating the workshop.

Review the lesson plan and workshop materials with your team in advance and make adaptations to the exercises so they are specific to your community context. You may choose to produce an illustrated poster for the workshop—especially if some participants can’t read. Role-play the exercises with your colleagues so that you will be better prepared when you present the workshop, and so you can discover if there are any cultural or linguistic problems.

**Be sure to take photographs**

Put someone in charge of photos. Have them take:

* close-up detailed shots of participants
* close-up detailed shots of the tools and materials that you use
* photos of interesting drawings that you might have done on the newsprint
* shots of the whole group
* a few shots if you facilitating the workshop

A big challenge that I see with nonprofits is a shortage of good quality photographs. Get close-ups of people so that they fill the frame of the photograph. Make sure they're smiling and looking at you. Make sure the lighting is good and that the photograph is in focus. If you're taking photographs outside where there's lots of glare, use your flash—it will balance out the glare. Take close-up pictures of people doing things—action shots. Take pictures of people doing the exercises in the workshop—such as drawing a map of the community—get right in there up close to take the photograph.

Don't take too many long distance shots because it's difficult to understand what they're about. Don't take pictures of the back of people looking at something—take pictures of the front of people looking at something. When you're composing your photograph make sure that there are not a lot of busy things happening in the background that will distract from your subject.

**How to Facilitate a Participatory Workshop**

A facilitator is not a teacher. During a participatory assessment, all participants are equally important. It is especially important to include women and marginalized members of the community. If you sense that, for example, men's comments may overshadow women's input, consider holding two meetings—one for men—and one for women.

The facilitator should not lead the participants in a direction where he or she thinks they should go. This could be challenging for many facilitators who work with organizations that have a specialized mission—health for example. What if the community feels that developing a market link for their agricultural projects is their highest priority—and that improved health isn't? In a pure participatory assessment a facilitator will need to set their mission aside and instead help the participants to better understand their own situation. They can then identify and prioritize challenges and participate in choosing and managing solutions and activities for improvement.

Facilitators need to maintain a positive attitude, and be open to new perspectives and new ideas. This may mean setting aside personal biases and assumptions. For example, in a participatory needs assessment workshop, your role as the facilitator is to help community members to:

* identify needs, challenges, and problems faced by the community at large
* prioritize these needs and challenges
* discuss the needs and challenges with the highest priority to identify consensus and disagreement
* to discuss what the underlying causes of challenges may be
* to discuss potential solutions and identify local coping strategies they are currently using

As the facilitator of a needs assessment you shouldn’t:

* feel that you are the director of the group
* give information: rather, let the participants hold discussions in order to provide you with information
* let your own personal biases lead you to make assumptions about what is the correct outcome of a discussion

Facilitators may need to draw upon new and unusual social skills such as dealing with dominant personalities in group settings—while at the same time fostering the participation of silent participants.

**Overview of Approaching the Members of a New Community for the First Time:**

If you are approaching a new community for first-time, it's best to approach community leaders initially, let them know the purpose of your visit, and help them to understand the importance of your work. It's a good idea to have introductory materials that describe your organization, the kind of work that you do, and illustrate the positive results that you have had. You might also want to explain about your method of engaging community members early on in the process—with the first step being a participatory needs assessment. Let them know that the purpose of the needs assessment is to get to know the people better, and to better understand their lives, needs and challenges. Be careful: these village leaders may feel that they can give you all of the information that you need. If that's the case suggests two participatory meetings—one with them—and a second one with community members in the greatest need.

With the leaders’ help and support, you will be able to meet community members interested in participating in your project—and in the initial needs assessment. Ask if they can help set up 3 hour meeting with 10 or 12 community members. Suggest that you would like to meet with community members that represent the ultimate beneficiaries (mothers, fathers, families, farmers, weavers—whoever describes the community you want to work with). The size of the group should not exceed 12 people.

Communities are diverse and you need to be sure that you are working with a representative example of its members. Each subgroup of community members will have their own set of needs; some members may even be self-serving. You will need to choose which groups will be the most representational of overall community need.