

The Adult Learning Facilitator's Toolkit:

Your Ready-to-Use Guide for High-Impact Training



This practical guide transforms foundational adult learning principles into actionable strategies you can implement in your very next training session. Whether you're a seasoned facilitator or new to adult education, you'll find concrete tools and techniques that make a real difference in learner engagement and outcomes.

What's Inside:

- **Core Principles Made Clear:** Understanding the six fundamental principles of adult learning and why they matter
- **90+ Ready-to-Use Strategies:** Specific, actionable techniques organized by principle with real examples
- **Interactive Training Tool:** Adult Learning Principles Bingo cards to make your sessions more engaging and bring the adult learning principles to life

Why This Guide Works: This toolkit focuses on **how** to apply adult learning principles in real training situations. Each strategy includes the "what" and "why" behind it, plus concrete examples you can adapt to your specific context. Bingo cards help generate ideas to bring it all to life.

Whether you're designing a new program or enhancing an existing one, these evidence-based techniques will help you create more effective, engaging learning experiences that stick.

★ **Ready to Transform Your Training?** ★ Start with any strategy that resonates with your current challenges—each one is designed to work independently or as part of a comprehensive adult learning approach.



What are the Principles of Adult Learning?

History

Malcolm Knowles, often called the “father of adult learning,” revolutionized our understanding of how adults learn through his development of andragogy—the art and science of helping adults learn. In contrast to pedagogy (the teaching of children), Knowles argued that adults have fundamentally different learning needs, motivations, and approaches. His work, primarily developed in the 1970s and 1980s, established foundational principles that continue to influence adult education, corporate training, and professional development today.

SIX PRINCIPLES OF ADULT LEARNING	IN SHORT...
1 Need to Know: Adults want to understand why they need to learn something before undertaking the learning. They want to know how the learning will benefit them and what consequences they might face if they don't learn.	Adults need to know why they should learn.
2 Self-Concept: Adults have a self-concept of being responsible for their own decisions and want to be seen as capable of self-direction. They resist situations where they feel others are imposing their will upon them.	Adults want to take responsibility for their learning.
3 Prior Experience: Adults come with a wealth of experience that serves as a rich resource for learning. This experience base provides a foundation for new learning and should be acknowledged and utilized in the learning process.	Adults learn through experience and use their prior experience in the process.
4 Readiness to Learn: Adults are ready to learn things they need to know to cope effectively with real-life situations. Their readiness to learn is often triggered by life events or role transitions.	Adults want learning to be immediately relevant to their lives or jobs.
5 Orientation to Learning: Adults are task-centered, or problem-centered, in their orientation to learning, rather than subject-centered. They learn best when new information is presented in the context of real-world applications.	Adults are task-oriented rather than information-oriented.
6 Motivation: Adults are more responsive to internal motivators (increased self-esteem, quality of life, job satisfaction) than external ones (grades, certificates, promotions).	Adults respond better to internal versus external motivators.

Adult Learning Principles Today

The six principles haven't been formally "updated" by Knowles (who passed away in 1997), but they've been extensively critiqued, refined, and expanded by other researchers over the decades. New considerations include:

- **Cultural Context** Critics noted that Knowles' principles reflected Western, individualistic values and may not apply universally across cultures. Collectivist cultures, for example, may place different emphasis on self-direction versus group harmony.
- **Context Dependency** Research has shown that adult learning varies significantly based on context, subject matter, and individual differences. The principles work better as flexible guidelines rather than rigid rules.
- **Digital Age Adaptations** Modern educators have adapted these principles for online and technology-enhanced learning environments, considering how digital platforms can support or challenge adult learning preferences.
- **Neuroscience Insights** Recent brain research has provided new understanding about how adults learn, including insights about neuroplasticity and cognitive processing, though findings largely support Knowles' original observations.

While Knowles' principles remain foundational in adult education, contemporary practice tends to view them as guidelines rather than universal rules. Today's educators emphasize the need to consider individual learner differences, cultural contexts, and specific learning environments when designing adult learning experiences. The principles continue to inform best practices in corporate training, higher education, professional development, and lifelong learning initiatives.

How Can I Apply Adult Learning Principles in My Training Design?

Here are a few strategies for applying adult learning principles in your training design, along with several examples. This is by no means a comprehensive list. Online searches for training facilitation tools, training activities, adult learning-based activities, and similar will provide you with many more options.

As training facilitators, we're always learning and improving. Test out several different options to learn what works best for you and your training attendees. Let your own creativity be your guide.

Key Approaches

- Provide options for autonomy and self-directed learning
- Emphasize training goals and outcomes
- Contextualize learning for real-world settings
- Ensure training content is both relevant and practical
- Invite collaboration and shared learning
- Foster Respect and Inclusivity
- Build in a lot of interactivity
- Offer space for feedback and reflection
- Ensure a comfortable environment



1 Provide options for autonomy and self-directed learning

What: Adults thrive when given autonomy to direct their own learning journey.

Why: Autonomy and self-direction allow adult learners to select learning paths that align with their goals and needs, respecting their professional demands and individual learning preferences. Adults bring a wealth of experience and self-concept to the learning environment and prefer to be seen as capable of self-direction.

Example Strategies: 🔍

1. Give Ownership of Learning Choices: Provide options for how and when to participate in learning.
2. Create an Independent Modular Structure: Divide the course into modules that can be completed in any order.
3. Provide On-Demand Resources: Offer access to webinars, readings, videos, and microlearning.
4. Encourage Personalized Learning Goals: Have learners set personal goals that align with the training objectives.
5. Incorporate Reflection Activities: Include regular reflection to assess progress.
6. Offer Variety: Provide several case studies/scenarios for learners to select from.
7. Allow Open Forum Discussions: Create opportunities for participants to share their experiences and perspectives.
8. Integrate Group Work with Choice: Form groups based on interests or professional backgrounds.
9. Implement Self-Assessment Tools: Provide tools that allow learners to evaluate their own knowledge and progress.
10. Create Learning Contracts: Develop agreements where learners identify their learning objectives and evaluation methods.
11. Encourage Independent Problem-solving: Present challenges that require learners to apply knowledge independently.

2 Emphasize training goals and outcomes

What: Goal orientation is a significant motivator for adults.

Why: Adults engage in learning with specific career advancement, personal development, or skill acquisition goals. They want to understand how the content will help them achieve their professional and personal objectives.

Example Strategies: 🔍

1. Present Tangible Goals and Objectives: Limit to 2-3 learning objectives per content area.
2. Establish Relevance: Review learning outcomes at the beginning of each training.

3. Showcase Measurable Outcomes: Provide numerical examples of results (e.g., infection rates before/after).
4. Emphasize Impact: Demonstrate how efforts substantially improve safety and health outcomes.
5. Provide Roadmaps to Success: Structure learning pathways with clear steps that lead to completion.
6. Use Progress Indicators: Implement visual cues that show advancement toward learning goals.
7. Incorporate Competency Assessments: Develop assessments that demonstrate mastery of specific skills.
8. Set Achievable Milestones: Break down larger objectives into manageable achievements.
9. Align with Professional Standards: Connect learning objectives to industry certifications or standards.
10. Implement Recognition Systems: Acknowledge accomplishments through badges, certificates, or other forms of recognition.
11. Share Success Stories: Present case studies of how the knowledge led to positive outcomes.

3 Contextualize learning for real-world settings

What: Adults learn best when connecting new information to their existing knowledge and experience.

Why: Adults build upon a foundation of existing knowledge and experiences. This connection enhances comprehension, retention, and application of new concepts.

Example Strategies: 🔍

1. Promote Openness: Foster an atmosphere where learners share experiences without judgment.
2. Facilitate Open Discussions: Use group discussions with diverse participants.
3. Ask Guided Questions: Use open-ended questions about lived experiences.
4. Encourage Storytelling: Invite learners to tell stories related to the topic.
5. Conduct Debriefing Sessions: After activities, discuss how experiences connect to new knowledge.
6. Incorporate Problem-Solving: Draw on past experiences to approach problems practically.
7. Create Experiential Learning Activities: Design exercises that mimic real-world scenarios.
8. Employ Metaphors and Analogies: Use familiar concepts to explain new information.
9. Develop Reflective Journaling: Encourage participants to document how content relates to their experiences.
10. Share Instructor Experiences: Model connection-making by sharing relevant personal experiences.
11. Build on Prior Knowledge: Begin sessions by exploring what participants already know about the topic.

4 Ensure training content is both relevant and practical

What: Provide opportunities to practice or envision how learning can be immediately applied.

Why: Adults prefer learning that can be immediately applied in real-world scenarios. Connecting learning to real situations helps learners retain new information and skills. Practical application increases motivation and engagement as adults see the direct value of their learning investment. Professionals need to understand how new knowledge translates to improved performance in their specific roles.

Example Strategies: 🔍

1. Provide Hands-On Training: Give participants opportunities to practice.
2. Integrate Case Studies: Use scenarios relevant to professional backgrounds.
3. Simulate Realistic Environments: Create “labs” based on real-world situations.
4. Use Practical Materials: Provide checklists, quick reference guides, and toolkits.
5. Develop Role-Playing Scenarios: Create situations where participants can apply skills in simulated contexts.
6. Incorporate Job Aids: Develop tools that support on-the-job application.
7. Use Problem-Based Learning: Present real workplace challenges for collaborative solving.
8. Create Transfer Activities: Design exercises that bridge classroom learning to workplace application.
9. Implement Spaced Practice: Schedule follow-up sessions where learners share application experiences.
10. Showcase Real-World Examples: Highlight successful applications in similar work environments.
11. Conduct Application Workshops: Hold sessions focused exclusively on implementing learning.

5 Invite collaboration and shared learning

What: Provide diverse opportunities for adults to share knowledge and experiences with peers.

Why: Group learning environments can provide a sense of community and support, making adults feel more comfortable taking risks and engaging in the learning process. It also creates a dynamic and meaningful learning environment that leverages the experiences and perspectives of all participants.

Example Strategies: 🔍

1. Form Interdisciplinary Groups: Include diverse roles (nurses, doctors, lab techs, support staff)
2. Create Opportunities for Participant Sharing: Ensure enough space in the agenda for participants to share their own experiences and lessons learned. Offer formal assessments and informal check-ins.

3. Ensure Availability: Provide office hours, email support, or Q&A sessions.
4. Share Resources: Develop portals where users can access additional materials.
5. Implement Peer Teaching: Have participants teach concepts to each other.
6. Design Collaborative Projects: Create group assignments that require shared contributions.
7. Facilitate Knowledge Sharing: Structure time for learners to share expertise.
8. Use Collaborative Technologies: Implement digital group work and communication tools.
9. Create Mentoring Opportunities: Connect experienced practitioners with newer professionals.
10. Incorporate Team-Based Challenges: Design competitive activities that require collaboration.
11. Encourage Peer Feedback: 🗣️ Include processes for constructive peer evaluation.

6 Foster Respect and Inclusivity

What: Create learning environments that respect diverse perspectives, experiences, and backgrounds.

Why: Adults bring varied cultural, educational, and professional backgrounds to learning situations. Inclusive environments promote psychological safety, encouraging full participation and risk-taking. Diverse perspectives enrich discussions and deepen collective understanding.

Example Strategies: 🔍

1. Establish Clear Guidelines: Set expectations for respectful interaction at the start of training.
2. Model Respectful Communication: Demonstrate inclusive language and active listening.
3. Recognize and Celebrate Diversity: Design activities that highlight diverse experiences and viewpoints.
4. Ensure Representation in Materials: Include diverse imagery, examples, and case studies.
5. Provide Multiple Participation Methods: Offer various ways to contribute (speaking, writing, digital tools).
6. Implement Universal Design Principles: Create accessible materials for varied learning needs.
7. Use Inclusive Language: Avoid jargon, acronyms, and terminology that may exclude participants.
8. Create Safe Spaces for Questions: Encourage questions without judgment or criticism.
9. Adapt to Different Learning Styles: Provide varied learning modalities (visual, auditory, kinesthetic).
10. Gather Input on Content Relevance: Check that examples resonate across diverse professional contexts.
11. Address Power Dynamics: Create structures that equalize participation regardless of position.

7 Build in a lot of interactivity

What: Engage learners through interactive, participatory learning experiences rather than passive information reception.

Why: Active participation increases engagement, retention, and application of new knowledge. Hands-on learning helps develop practical skills that transfer to real-world settings. Interaction with content promotes deeper cognitive processing and critical thinking. Active learning accommodates different learning styles and preferences.

Example Strategies:

1. Implement Hands-on Activities: Design practical exercises that apply theoretical concepts.
2. Facilitate Discussion-Based Learning: Create structured discussions around key topics.
3. Use Problem-Based Learning: Present real challenges for collaborative solving.
4. Design Simulations and Role-Playing: Create realistic scenarios for skill practice.
5. Use Think-Pair-Share Activities: Allow individual reflection followed by partner discussion.
6. Integrate Technology-Enhanced Learning: Use interactive polls, quizzes, and digital activities.
7. Create Learning Stations: Set up different activity areas that participants rotate through.
8. Implement Jigsaw Learning: Assign different content to groups, teaching others.
9. Use Concept Mapping: Have participants visually organize relationships between concepts.
10. Incorporate Games and Gamification: Design competitive or collaborative learning games.
11. Develop Reflective Practice Activities: Structure reflection on learning and application.

8 Offer space for feedback and reflection

What: Provide opportunities for learners to receive input on their progress and reflect on their learning journey.

Why: Feedback helps adults gauge their progress and identify areas for improvement. Reflection deepens learning by promoting metacognition and connecting new information to existing knowledge. Regular assessment supports the goal-oriented nature of adult learning. Self-evaluation builds autonomy and encourages ongoing development.

Example Strategies:

1. Provide Timely, Specific Feedback: Offer input focusing on concrete behaviors.

2. Create Self-Assessment Opportunities: Develop tools for learners to evaluate their own progress.
3. Use Formative Assessments: Incorporate low-stakes checks throughout the learning process.
4. Design Reflection Prompts: Create guided questions that encourage thoughtful consideration.
5. Document Learning: Encourage ongoing documentation of insights and questions.
6. Debrief: Lead group reflections after significant learning activities.
7. Create Application Plans: Help learners develop strategies to implement new knowledge.
8. Implement Follow-Up Assessments: Check in after training to evaluate application and retention.
9. Use Technology for Immediate Feedback: Implement digital tools that provide instant assessment.
10. Facilitate Reflective Discussions: Create spaces for shared reflection on learning experiences.

9 Ensure a comfortable environment

What: Create physical and virtual learning environments that support focus, engagement, and participation.

Why: Comfortable, well-designed environments minimize distractions and maximize learning potential. Physical comfort allows learners to focus on content rather than environmental stressors.

Example Strategies:

1. Ensure Appropriate Physical Settings: Consider temperature, lighting, acoustics, and seating.
2. Technical Readiness: Test all equipment beforehand and have backup options available.
3. Create Distraction-Free Zones: Minimize noise and visual distractions.
4. Design Flexible Spaces: Arrange rooms to accommodate various learning activities.
5. Optimize Virtual Environments: Ensure clear audio, visible materials, and user-friendly interfaces.
6. Provide Technical Support: Offer assistance for technology-related challenges.
7. Establish Psychological Safety: Foster environments where mistakes are viewed as learning opportunities.
8. Consider Timing and Pacing: Schedule sessions with attention to energy levels and attention spans.
9. Incorporate Movement Opportunities: Plan for physical activity to maintain engagement.
10. Create Accessible Spaces: Ensure environments accommodate diverse physical and cognitive needs.
11. Provide Resource Access: Ensure materials are readily available and organized.



Adult Learning Principles Bingo

Overview

This bingo game is designed to help trainers and facilitators recognize and apply adult learning principles in their practice. This interactive activity encourages participants to identify how these principles are applied in training sessions.

Materials Needed

- Printed bingo cards (one per participant)
- Markers or stickers for tracking spotted items
- Reference sheet of adult learning principles and strategies
- Small prizes (optional)

Instructions

1. Distribute one bingo card to each participant at the beginning of a training session or workshop.
2. Explain that the goal is to identify when adult learning principles are being applied during the session.
3. When participants observe an example of an adult learning principle in action, they mark that square.
4. The first person to complete a row, column, or diagonal calls "Bingo!"
5. The winner explains each principle they marked and how they observed it.
6. Continue playing for additional winners as time allows

Alternative Ways to Use the Bingo Cards

- Reflection Bingo: Use at the end of training for participants to reflect on principles they observed
- Implementation Bingo: Use as a planning tool for trainers to ensure they incorporate various principles
- Peer Observation Bingo: Use during peer teaching observations to provide constructive feedback
- Principles in Practice: Have participants create their own examples of how they would implement each principle.

B I N G O

Learners set personalized learning goals

Facilitator reviews learning outcomes at the start of the session

Hands-on practice opportunities

Participants are encouraged to connect learning to their settings

Interactive polling technology is used for engagement

Participants share specific experiences during the discussion

Participants have different options for providing input/asking questions

Problem-solving based on real situations

Access to additional resources is available

Opportunities for peer sharing

Participants are guided to share their own experiences

Provide Checklists or quick reference guides

FREE SPACE

Diverse perspectives are encouraged and valued

Reflection activity connecting content to prior knowledge

Inclusion of gamification elements

A variety of techniques for learning are used

Hands-on activities

Participants with varied experience levels grouped together

Role-play activities

Provide multiple participation methods

Participants given clear guidance on what will happen during training

Scenarios relevant to participants' work environments

Instructor available for questions after formal session

Expectations for participants are clear and established up front

B**I****N****G****O**

The room environment is conducive to learning

Ask guided questions about lived experiences

Instructor availability through office hours or email

Participants grouped by similarities

Integrate relevant scenarios into the training

Participants have opportunities to practice applying what they have learned

Use a variety of resources and tools

Use practical materials like checklists and quick reference guides

Encourage personalized learning goals

Debrief segments to connect experiences to new knowledge

Create opportunities for peer sharing

Provide flexible access to on-demand resources

FREE SPACE

New tools shared or discussed

Offer a variety of case studies for learners to choose from

Facilitate open discussions with diverse participants

Share additional resources to learn more

Provide different options for learning

Simulate realistic environments based on real-world situations

Provide a way for participants to journal/take notes

Incorporate technology tools like polling

Provide hands-on practice opportunities

Provide multiple methods for participants to engage

Encourage storytelling related to the topic

Give participants opportunity to reflect

B I N G O

Create engaging content with interactive modules

Give ownership of learning choices for participation

Implement feedback loops on the training application

Create opportunities for participants to share

Tailor examples using shared experiences

Emphasize impact, showing how efforts improve outcomes

Share official materials from partner organizations

Promote openness for sharing experiences without judgment

Provide on-demand resources (webinars, readings, videos)

Showcase new tools or technologies

Use realistic situations for problem-solving

Incorporate problem-solving, drawing on past experiences

FREE SPACE

Offer short microlearning segments (3-10 minutes)

Review learning outcomes at the beginning of training

Role-play activities

Allow for open forum discussions to share experiences

Provide opportunities to envision immediate application

Limit to 2-3 clear learning objectives per content area

Make resources available on demand

Use interactive technologies/strategies

Create an atmosphere where challenges can be shared

Integrate group work

Provide "simulation labs" for practicing techniques

Promote openness and sharing without judgment



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Have questions about the toolkit? Email infectiousdisease@naccho.org.



The mission of the National Association of County and City Health Officials (NACCHO) is to improve the health of communities by strengthening and advocating for local health departments.

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