



**OPPORTUNITY**  
International

# **PATHWAYS TO WELLBEING**

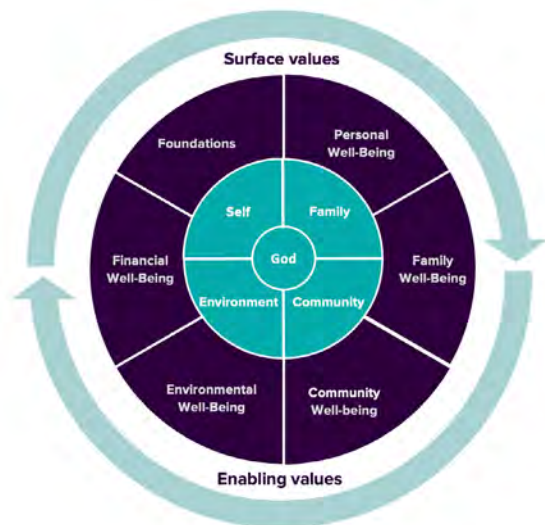
**An innovative, holistic,  
values-based training  
system**

# CATALYZING CLIENT-OWNED PATHWAYS OUT OF POVERTY

## *Using a holistic, values based training*

### **Singular solutions cannot move people out of poverty and its complexities**

People living in poverty face a complex web of obstacles as they work to improve their circumstances. For example, picture a fishing village in Ghana where declining fish stock have reduced incomes, and limited available job opportunities outside of fishing mean many people handle the stress by drinking. Poor infrastructure in the nearby communities causes waste to pile up—contaminating nearby water sources and the closest fishing spots. While most development professionals understand the multidimensional nature of poverty, by necessity, many organizations must focus their interventions on certain key areas. Organizations need a way to maintain this focus while still touching on other aspects of clients' lives to ensure clients can make progress across the various dimensions of poverty.



The Pathways module topics connect to the *shalom* relational domains using a values-based lens

### **Empowering clients to take ownership of their journeys out of poverty**

Movement out of poverty begins not by “filling” people with the right knowledge, but rather by “conscientizing” them—raising awareness of areas for development and inspiring them to see that change is possible.<sup>1</sup> Then, even specialist organizations can support people to seek solutions through a) the organization’s own services, b) linkages with other organizations and resources, or c) community-based self-help. The solution lies in how we equip clients to take ownership of their unique progress out of poverty.

**“Movement out of poverty begins not by “filling” people with the right knowledge, but rather by ‘conscientizing’ them.”**

### **Opportunity has reimagined client group trainings through a holistic, values-based lens**

God’s vision for humanity is inherently multi-dimensional. *Shalom* offers a beautiful, biblical vision for the well-being that God wants for humanity: joyful, flourishing relationships with God, with Self, with Others, and with Creation. Moreover, the Christian worldview provides rich values that inform development, beginning with understanding that God has created us in His image with dignity

<sup>1</sup>Freire, Paulo. *Pedagogy of the Oppressed*. New York: Herder and Herder, 1972. Print.

and purpose. We have created a training system that, in addition to expanding knowledge and skills, nurtures and leverages attitudes and values that motivate positive behavior and positive life change in our clients. (See figure.)

**"Shalom offers a beautiful, biblical vision for the well-being that God wants for humanity."**

### **Values-based training goes deeper than knowledge or skills to catalyze behavior change**

Behavior can be surprisingly difficult to change. The external and internal factors that hinder positive behavior can be hidden under the surface. This training explores participants' contexts and values, working to diminish the pull of those that hold them back, and to amplify the ones that support positive growth in the context

of community. The cornerstone of this training is the principle of shalom and its harmonious, multidimensional relationships. This training seeks to touch the attitudinal/values dimensions even as participants seek to change their situation.

### **Clients practice active learning, and organizations practice active listening**

Following training best practices, the Pathways to Wellbeing (Pathways) program is grounded in participatory client engagement and the use of diverse learning tools, including stories and videos with discussions, games, and follow-up communication between sessions to remind or "nudge" people to action. Lessons touch on a range of topics. At the same time, trainers facilitate client self-assessment, which generates data for both clients and the organization. The facilitators and staff then consider client input and customize the order and depth of training topics, make facilitation adjustments, and potentially mobilize external resources if necessary. The self-assessments take place regularly, to encourage reflection. This training system empowers clients to own their respective development journeys.

# THE TRAINING SYSTEM

## **Cultivating a supportive system for holistic development.**

As clients actively learn and grow, they receive support from fellow group members committed to the journey towards greater holistic wellbeing, as well as from the trainers. The "system" surrounding the trainings enables training organizations to be responsive—constantly pulling from client and trainer feedback to adjust lesson content and format, call on external resources when needed, and catalyze community action when relevant. The Pathways to Wellbeing program can be roughly broken down into the following four steps:

- 1. Mobilize** this holistic training approach by implementing an organizational structure and engaging a target client base.
- 2. Facilitate** participatory, discussion-based training sessions driven by clients' priorities.
- 3. Listen** to clients' own development priorities and feedback on the training sessions.
- 4. Respond** to client feedback through adaptations, linkages, and further support as relevant.

The remainder of this brochure delves into these four steps in the training system.

# MOBILIZE

## Enabling your organization to transform lives, households, and communities

The Pathways program is designed to awaken clients to their God-given gifts and opportunities for development by enabling clients to adjust mindsets and maximize assets. By equipping clients with knowledge, skills, and mindsets that enable positive change, they are empowered to flourish in all aspects of life, family, and community.

## A flexible training approach that fits existing operations

The Pathways program is highly flexible. Organizations with limited training experience can use the program to establish a robust training program. Organizations with an existing training program can utilize it to optimize and systematize

their ongoing training work. The training has been created to take advantage of existing touchpoints with clients (e.g., a trust group, a farmers' association, a women's empowerment group) by creating accordion-style lessons that can condense to half-hour sessions or expanded for up to 90 minutes of rich content. Lessons can also be grouped to create longer workshop events.

**"By equipping clients with knowledge, skills, and mindsets that enable positive change, they will be empowered to flourish in all aspects of life, family, and community."**

## A committed institution forms the foundation for a successful training system

The following three commitments are critical for ensuring that this training system is successfully implemented:

1. A financial commitment to equip and support a training team. (In cases where field operations already underway, this may not require much additional cost.)
2. A methodological commitment to support a training philosophy that is distinctly different from old didactic approaches – focusing on listening, facilitating, empowering.
3. A policy commitment to have training identified as a distinct and important organizational component, incorporated down to the job description of those involved in the training.



# FACILITATE

## Embracing an intentional philosophy of training

The Pathways program is informed by known best practices in adult education. Adults retain new learnings best through conversations grounded in the sharing of personal experiences and fun, participatory activities such as games and roleplaying. These activities drive deeper behavior change through the exploration of attitudes (including motivations, values, and beliefs) and equip clients with tools and coached practices in new behaviors relevant to current real-life challenges.<sup>2</sup>

## PATHWAYS LESSON OUTLINE

- ▶ **Greeting and review**  
*Introduce the discussion topic for the day and hear how last week's home practice assignment went.*
- ▶ **Set the tone**  
*A fun game or discussion prompt to get people thinking about the day's topic.*
- ▶ **Reflect on everyday situations**  
*Watch or listen to a relevant story, discuss as a group.*
- ▶ **Explore new concepts**  
*Introduce a new idea or information through visual aids and discussion.*
- ▶ **Practice in community**  
*Use methods like role playing to try out new skills and behaviors.*
- ▶ **Connect to values and beliefs**  
*Reflect on how learnings from the session align with other sources of wisdom, including Scripture.*
- ▶ **Integrate into daily life**  
*Leave the session with a new skill or behavior for participants to practice at home.*

## CORE WELLBEING MODULES

- ▶ Foundations
- ▶ Family
- ▶ Financial
- ▶ Community
- ▶ Personal
- ▶ Environmental

## Client input informed curricular topics

The lessons in the Pathways curriculum were selected and designed based on in-depth interviews with savings group and microfinance clients in Latin America and Africa. Six thematic modules with four lessons each form the basis of the core curriculum, with each module focusing on different aspect of wellbeing. (See “Core Wellbeing Modules.”) The content involves reflecting on values and life, discussion of real-life situations and challenges, and invites commitment to change. The lessons are designed to build on one another over time and nudge clients to engage issues together as a group—providing support and encouragement towards incremental change. (See Pathways Lesson Outline.)

## Trainers as facilitators

Within Pathways, trainers act as facilitators who spark conversations among group members by presenting topics for discussion. Facilitators also play a crucial role in helping the group probe below the surface of commonly held beliefs (e.g., savings is important) to understand the deeper values, beliefs, and motivations that may hinder us from behaving in the ways we want or feel we should (e.g., only rich people can afford to save money). Trainers are supported in this role initially through a Training of Trainers that emphasizes skills in group facilitation, and in an ongoing capacity with guidance and oversight from a training supervisor.

<sup>2</sup> Some examples include a graduation program in Paraguay that emphasized self-confidence in their training (Kristof, Nicholas. “Cash, Food, and Healthcare All Help the Poor, but Something is Still Missing.” New York Times. 29 May 2019. <https://www.nytimes.com/2019/05/29/opinion/poverty-paraguay.html>), a rigorous study of a business training program focused on personal initiative and self-determination helping business owners in China experience higher increases in profits and sales than business owners receiving traditional skills-based training (McDonald, Libby McDonald “What’s the Best Way to Teach Entrepreneurship? Assessing the Impact of Different Business Training Approaches.” Next Billion. September 11, 2018. <https://nextbillion.net/best-way-to-teach-entrepreneurship/>), and peer-reviewed study of microloan clients in Mexico—finding that microfinance clients received biblically-based training about hope and goal-setting raised their aspirations and improved their businesses (Lybbert, Travis and Bruce Wydick. Hope as Aspirations, Agency, and Pathways: Poverty Dynamics and Microfinance in Oaxaca, Mexico. 2016).

# REFLECT

## **Clients made aware and empowered to choose**

The training modules introduce participants to key dimensions that can bring holistic wellbeing to their lives, households, and communities. A component of each lesson offers clients an opportunity to assess their current level of wellbeing and invites reflection on where they would like to go. As clients become more aware of their status across multiple dimensions, they can prioritize for themselves and for their family the challenges they wish to tackle – inviting them to own their wellbeing journey.

## **Facilitators that listen and reflect**

Facilitators listen attentively during discussions to understand the main strengths of and challenges faced by training participants. Strong emphasis on

listening and reflecting on collected information allows the training team to understand priority topics, to get a sense of the concerns and hopes of the group(s), and to acquire a sense of the key journeys that require support.

## **Conversations, consensus, and commitment**

As already touched on in the previous section (“Facilitate”), the lessons are best understood as facilitated conversations where the role of the participant is not simply to listen, but to engage in dialog. Discussions can lead individuals and groups to see value in jointly sharing struggles, considering solutions, and embracing commitments towards joint progress. Thoughtful reflection on these conversations also enable training teams to respond and adapt on multiple fronts, as detailed in the next section (“Respond”).



**"Facilitators listen attentively during discussions to understand the main strengths of and challenges faced by training participants."**

# RESPOND

Training teams gather periodically to discuss and reflect on issues being faced by the client groups, enabling the team to be responsive to current realities and consider whether certain issues deserve special attention going beyond the standard modules.

## **Adapt and develop trainings offered**

Insights from listening and measurement activities are fed back into the organization to aid in finding or adapting additional lessons. This may be as simple as the training team innovatively creating a new lesson or, should the organization deem it important, bringing in subject matter experts based on clients' learning and development priorities.

**Organizations are equipped to respond to clients by adapting future trainings, partnering with other organizations, and empowering client-led initiatives.**

## **Building useful collaborations**

When clients express interest in information or services outside of the organization's core areas of expertise, it provides an excellent opportunity for partnership. Staff may begin simply by referring clients to other local resources with a relevant focus. However, as awareness of clients' multidimensional priorities increase, it may also be possible to establish mutually beneficial partnerships and a collaborative structure among multiple organizations.



## **Amplify client-led initiatives**

Empowered clients have the agency to actualize their own solutions. Organizations should encourage and support these independent initiatives that rise out of discussions at the training group level. This progression is only natural, as clients grapple with multidimensional topics and begin to consider not only their personal well-being journeys, but those of the wider community and the environment.

# IS YOUR ORGANIZATION INTERESTED IN IMPLEMENTING HOLISTIC DEVELOPMENT TRAINING?

Opportunity International is here to support! Contact Opportunity's Knowledge Management team at [KM@opportunity.org](mailto:KM@opportunity.org) for more information on how your organization can implement this unique, holistic training approach.

For more information on Opportunity's holistic assessment approach, the Holistic Community Assessment (HCA), visit [www.opportunity.org/holistic-assessment](http://www.opportunity.org/holistic-assessment) to learn more and download our free HCA toolkit.



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[opportunity.org](http://opportunity.org)  
800.793.9455  
550 W. Van Buren St.  
Suite 200  
Chicago, ILLINOIS 60607

## Mission

By providing financial solutions and training, we empower people living in poverty to transform their lives, their children's futures, and their communities.

## Vision

A world in which all people have the opportunity to achieve a life free from poverty, with dignity, and purpose.

## Motivation

We respond to Jesus Christ's call to love and serve the poor. We seek to emulate the Good Samaritan, whose compassion crossed ethnic groups and religions.