Facilitator Training Manual

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"I seek a method by which teachers teach less and learners learn more."

-John Comenicus

Acknowledgements

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- Wendy Harris
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Introduction

As facilitators we have an enormous opportunity and responsibility to empower our participants to learn. The term *facilitator* is used here as it better reflects what your role truly is, you are to facilitate a learning experience, not just simply teach material. We will also use the term *participant* versus student as it also reflects better the role that these individuals will have. They will not be simply sitting in a classroom being spoon fed information. They will be active participants in their learning experience. How we educate individuals is changing.

There are many theories/principles of adult education, all with their own pros and cons. The principle underlying this manual is that of experiential learning. Norman Weinstein (2008) describes that, "*if an educator's chief role is to provide the tools for students to transform themselves into lifelong, independent learners who assess truths in subjects through their own authoritative analysis of feelings and thoughts, then experiential learning has a legitimate place in classrooms*." Most of us would agree that the best way for us to serve our participants is by empowering them to become lifelong, independent learners with the ability to be critical thinkers.

It is difficult to change the way we do things, including how we facilitate. As we explore ways to become better facilitators we need to recognize that implementing change will require energy and patience. Just as a new driver struggles to drive a standard for the first time, to get the timing between the clutch and the gas just right, you too may struggle when incorporating new ideas or trying new ways of facilitating. And just as practice allows the new driver to drive without much thought for the process, you too will be able to facilitate with much less effort, the more you practice. Our old ways of doing things may seem so much easier, this is simply because that is what we are used to. Just because something seems easier does not mean that it is better.

This manual and the training that accompanies it, is designed to give you the tools and resources that you need to become a great facilitator. Education is changing; we need to change with it.

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Facilitation

When facilitating a learning experience it is not the content that is the most important, it is you and your ability to facilitate (Brooks-Harris, 1999). If you think back to courses or workshops that had the greatest impact on you and your learning, chances are it was the facilitator that created that impact, not the content. So while you need to be a content expert you also need to be a facilitation expert.

Your role is that of an instructor and a facilitator. There is a body of content knowledge that you bring to your participants as an instructor. At the same time you have a responsibility to facilitate an environment and a process that promotes effective adult learning. It is important to remember both of these roles, both are essential for ensuring a positive learning experience.

Your roles and responsibilities include:

- *Maintaining Focus* – to keep the participants on track with the information/task at hand
- *Enhancing Participation* – to encourage all participants to engage in the learning process
- *Maintaining the Environment* – to create and maintain a safe, positive learning environment
- *Being Neutral* – treat all contributions from participants fairly and equally, ensure students are not favoured or ignored and that the information they have presented is correct
- *Offering Encouragement* – to all participants to engage and contribute

Qualities of a Great Facilitator

What makes a great facilitator? If you think back to your own experiences you will probably be able to recall examples of the good, the bad and the great. There are many different characteristics, some include:

- giving clear explanations
- ensuring content is relevant
- stressing important points in lectures/discussions
- being enthusiastic, friendly, flexible
- presenting material in an interesting way
- enjoying facilitation
- having a thorough knowledge of the subject
- being able to handle unexpected questions
- facilitating near the class level
- treating participants with respect
- encouraging constructive criticism
- supporting a lot of classroom discussion
- using class time well
- being well prepared for each class
- clearly explaining the objectives of the course
- acknowledging participants when they contribute to the discussions

Why Facilitate?

Great facilitators also have a strong understanding of why they are a facilitator. How does facilitating inspire them? Why is it important to help others learn? The answers to these questions will be different for each person. The point is that if you do not know why you are a facilitator, if you do not have a passion for inspiring others to learn and grow, then perhaps this is not the avenue for you. Here are some questions to get you started:

- Why do you facilitate?

- What is the impact that you can have on your participants?

- What inspires you about facilitating? What drains you?

And finally, don't be afraid to have a little fun! Great facilitators are also entertainers -- they know that when people are enjoying themselves they are much more receptive to new information. The true magic in facilitation lies within your ability to make the learning process enjoyable and fun. Even serious topics can be delivered with an element of humour.

Public Speaking

Speaking in front of people can be a nerve wracking experience. Often times when facilitators are nervous they end up reading their presentation instead of actually facilitating it. Your notes, overheads etc., are an outline to guide your discussions, simply reading them will hinder the creation of a dynamic and engaging learning environment.

Videotaping yourself facilitating is a great way to improve your public speaking skills. It allows you to not only hear the message that you are delivering but to also see how that message is being delivered – hear the tone of your voice and quality of speaking (are you overusing um's and ah's?), and observe your body language (excessive fidgeting etc.). By identifying these behaviours you can take steps to correct them. Honing your professional development skills will be discussed later on in this manual.

If this is an area that you want to improve, consider connecting with a local Toast Master's group (www.toastmasters.org). This nonprofit organization now has nearly 235,000 members in 11,700 clubs in 92 countries, offering a way to practice and hone communication and leadership skills.

Self-Management

Just as your participants have lives outside of this session, so do you. It is important to make sure that as a facilitator you are mentally clear before starting. If your mind is somewhere else it will take you away from focusing on your participants and their learning experience. To clear your mind and to prepare for your course try one or more of the following:

- Find a quiet spot and sit for a few minutes. Let yourself relax as you breathe deeply.
- Listen to music that puts you in a good mood.
- Write down on a piece of paper the things that are occupying your mind. Allow yourself to think about your role as a facilitator knowing that you can come back to this list at the end of the session.

Facilitation Assessment

In order to continue to develop your skills as a facilitator it is important to look at the areas of facilitation that you struggle with. Identifying these areas can be done in a number of ways:

- *Peer evaluation* – have a fellow facilitator either sit in on one of your sessions or have them watch a video of you facilitating

- *Self-evaluation* – watch yourself on video. Note how you stand and the expressions on your face. Watching yourself on video allows you to hear the tone of your voice and the quality of your speaking. You can also complete a self assessment questionnaire (see page 12).

- *Participant evaluation* – what consistent pieces of constructive feedback are coming up on the course evaluation forms? Use this information to help guide what areas of your facilitation you may need to look at. See page 14 for a sample course evaluation form.

If you are asking someone else to evaluate your facilitation skills consider asking them to use the following format:

- Identify three things that you did well
- Identify two things that you could have done better
- Identify the one thing that you did best

Regardless of the method that you use to assess your skills, what is important is that you collect information that will enable you to become aware of things that you do, that may be taking away from the positive learning environment. These could be things as simple as your flip chart papers being impossible to read from the back of the room to responding to participants in a way that makes them feel unsafe. Both of these things will have an impact on the learning environment.

Once you have an idea of the areas that need development the next step is to actually create your own development plan. How are you going to improve in those areas? What type of support or resources do you need? The overall goal of this process of self reflection is described by Grasha (2002, pg. 49), "….to learn from our experiences in order to make ourselves better teachers." Just as our participants will have the most impactful learning through experiential processes, so will you as a facilitator.

Facilitating within this context of experiential learning can be an uneasy process for many people. Will you lose control of the participants as they engage in activities? Will you run out of time and not be able to cover all the content? Both of these issues are very real.

What experiential learning requires of us as facilitators is a much more deliberate approach to how we design our courses and a much more rigorous ability to manage the dynamics of our group. The payoff to being better prepared, more rigorous facilitators, is the creation of a more impactful and effective learning experience for our participants.

Sample Self Assessment Questionnaire

Earlier we discussed four different facilitation styles as they relate to the experiential learning process. Brooks-Harris (1999) created the following assessment tool to highlight which styles you use more naturally. It is important to be aware of our default, our preferred ways of facilitating, so that we can identify facilitation styles that we don't use very often. When we stick to only one or two facilitation styles we run the risk of not creating the best learning experience for all our participants.

For each numbered item, use the following scale to indicate the likelihood that you would use a facilitation skill like the one listed. Make sure that you rank each item.

4 = I am most likely to do/say this in my courses
3 = I am somewhat likely to do/say this in my courses
2 = I am less likely to do/say this in my courses
1 = I am least likely to do/say this in my courses

Skills

1. a._____ Share your outline or agenda with the group
   b._____ Use case studies
   c. _____ Ask for volunteers
   d. _____ Assign/suggest homework

2. a. _____ "We are doing this exercise because……."
   b. _____ Take a vote
   c. _____ Use worksheets
   d. _____ "Let's spend time as a group brainstorming ways that we will act differently from now on."

3. a._____ "Can you tell me more about your experience with that issue?"
   b. _____ Provide informative handouts
   c. _____ "It seems like there is a disagreement in the group……"
   d. _____ Encourage goal setting related to the program topic

4. a. _____ Use guided imagery to begin a program
   b. _____ Give lecturettes (brief lectures) on a topic
   c. _____ Involve participants in role plays
   d. _____ "I'd like each of you to think about how you might use this new knowledge…."

5. a. _____ Use brainstorming activities
   b. _____ Show videos
   c. _____ Ask participants to repeat a task, incorporating newly learned skills
   d. _____ "How will you respond to (e.g.) disruptive students?"

6. a. _____ Set ground rules for the presentation
   b. _____ Answer participants' questions
   c. _____ Encourage direct interaction among the participants
   d. _____ Disclose how you have used the information in your own life

7. a. _____ "That's a great question. Does anyone have an answer for that one?"
   b. _____ Identify themes in a group discussion
   c. _____ Ask for feedback regarding an exercise
   d. _____ Encourage future action related to the program topic

Scoring – write the number of points for each statement and tally them up.

1.	a = _____	b = _____	c = _____	d = _____
2.	a = _____	b = _____	c = _____	d = _____
3.	a = _____	b = _____	c = _____	d = _____
4.	a = _____	b = _____	c = _____	d = _____
5.	a = _____	b = _____	c = _____	d = _____
6.	a = _____	b = _____	c = _____	d = _____
7.	a = _____	b = _____	c = _____	d = _____
Total	a = _____	b = _____	c = _____	d = _____

The highest numbers correspond to the skills you use the most often – your default skills; the lower numbers are skills that you use less often.

"a" items refer to engaging facilitation skills
"b" items refer to informing facilitation skills
"c" items refer to involving facilitation skills
"d" items refer to applying facilitation skills

Sample Course Evaluation Form

It is important to have participants complete an evaluation form for every course that you facilitate. This information allows you to receive some constructive feedback and insight into how you can make the course better. It is best to review the evaluation forms within a few days of the course ending and then making note of what changes you will make for the next time around.

Date of course: August 2014
Name of course: BCRPA Train the Trainer

Course facilitator's name: John Doe

Please use the following scale to evaluate the course you just completed. Please be honest, as the information gathered will be used to further improve the course for future participants.

1 = poor
2 = needs improvement
3 = adequate
4 = good
5 = excellent

Course conductor's presentation style	
Knowledge of course conductor	
Positive learning environment	
Speed that the material was presented	
Course book and materials	
Location	
Days and times	

What are 3 things that you learned that you will take away with you?

____

____

____

What are 2 things that you would change about this course?

____

____

____

What is the 1 thing that you enjoyed the most:

Other comments:

Adult Learning

In order to understand what it takes to be a great facilitator you need to understand how adults learn and process information. Without this understanding you are planning a road trip without a map. You know where you want to go (being a great facilitator) but you don't know the best way to get there (how adults learn best). Before we dive into the theory of adult learning it is important to understand a few basic definitions:

- *Learning style* – refers to the way in which a person takes in information

- *Learning preference* – refers to our preference for a particular facilitation style. This preference depends on learning situation that we are in

- *Learning strategies* – actions that are chosen to increase the effectiveness of facilitation and learning

Experiential Learning Model

It is important to have a basic knowledge of learning theory so that you are able to understand how critical the methods you use to facilitate are to the learning experience of the participants. Research shows that active learning processes help participants to learn and recall information better (Grasha, 1998).

Facilitating within an experiential learning model may also be a challenge for your participants to adapt to. There is a tendency for participants to "see the teacher as largely responsible for their successes and failures as learners" (Grasha, 1998 pg. 225). So at the very start of your course ensure that your participants understand that they will be involved in the learning process and that they may feel uncomfortable at first.

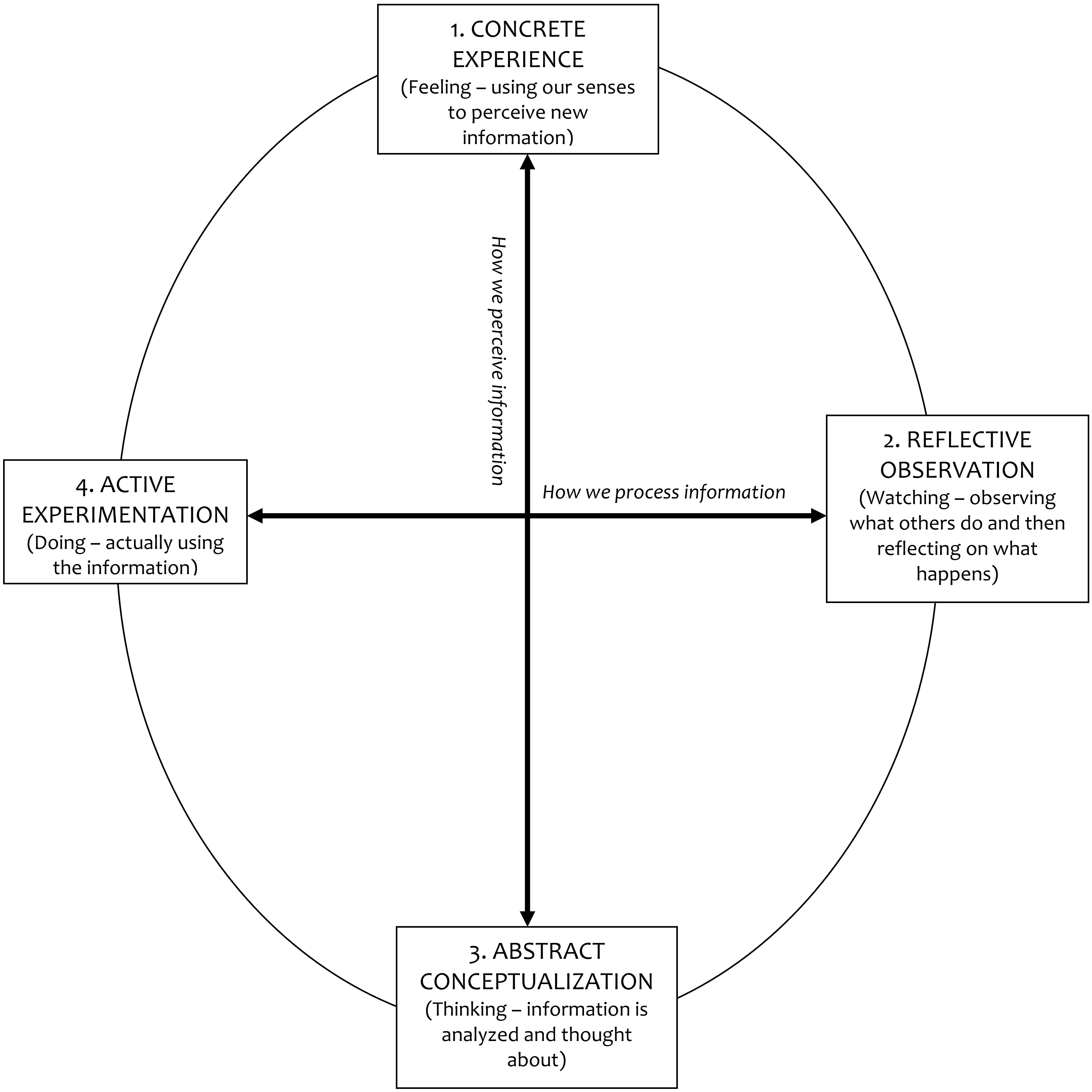
There are many researchers who have been involved in the development of experiential learning models. One of the most respected models is that of David Kolb. This model informs the learning process, learning styles and subsequent facilitation techniques (Brooks-Harris, 1999). The four step model of experiential learning is (Kolb et al, 2000):

- *Step 1* – concrete experience– using our senses to perceive new information

- *Step 2* – reflective observation – observing what others do and then reflecting on what happens

- *Step 3* – abstract conceptualization – information is analyzed and thought about

- *Step 4* – active experimentation – actually using the information


1. CONCRETE EXPERIENCE
(Feeling – using our senses to perceive new information)
How we perceive information
2. REFLECTIVE OBSERVATION
(Watching – observing what others do and then reflecting on what happens)
How we process information
4. ACTIVE EXPERIMENTATION
(Doing – actually using the information)
3. ABSTRACT CONCEPTUALIZATION
(Thinking – information is analyzed and thought about)

Experiential Learning Styles

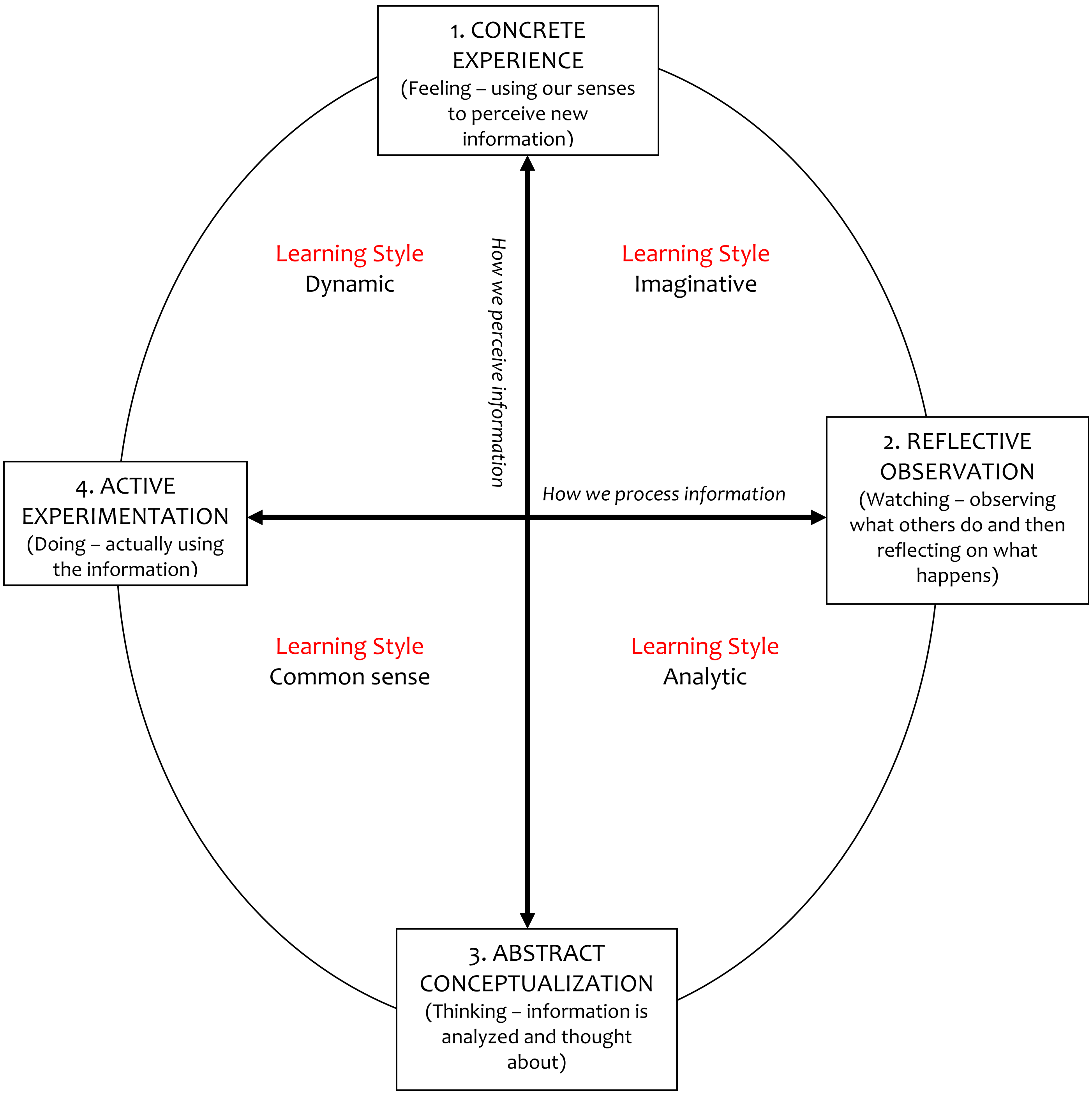
Through continued research Kolb developed four basic learning styles that are connected to his model of learning. In brackets you will see Kolb's original names for each style. The names that we will be using in this manual are those from McCarthy (1980, 1990) as they are more user-friendly

- *imaginative learners* (divergers)
  - dominant learning abilities are concrete experience and reflective observation
  - like to gather information, work in groups
  - good at looking at concrete situations from many perspectives
  - open minded
  - value personal involvement and interaction

- *analytic learners* (assimilators)
  - dominant learning abilities are abstract conceptualization and reflective observation
  - good at taking large amounts of information and putting into a concise, logical form
  - more interested in ideas and abstract concepts than people
  - prefer readings, lectures and analytical models
  - value expert knowledge, data and analysis

- *common sense learners* (convergers)
  - dominant learning abilities are abstract conceptualization and active experimentation
  - good at taking ideas and theories and finding practical applications
  - good at problem solving
  - prefer technical tasks versus social and interpersonal tasks
  - prefer simulations and practical applications
  - value direct involvement, practice and active experimentation

- *dynamic learners* (accommodators)
  - dominant learning abilities are concrete experience and active experimentation
  - learn mostly from hands-on experiences
  - rely more on people for information than their own technical analysis when solving problems
  - apt to act on gut instinct versus logic, want to get the task done
  - prefer to work with others, set goals, do field work and to try different ways when completing a project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(Doing – actually using the information)
How we perceive information
How we process information
Learning Style
Dynamic
Learning Style
Imaginative
Learning Style
Common sense
Learning Style
Analytic

Experiential Learning Processes

The four different learning styles described above will have different preferences for how information is presented and how they interact with what they are learning. These styles can change depending on the topic and the situation. Brooks-Harris (1999) has identified the following four experiential learning processes that correspond with the learning styles:

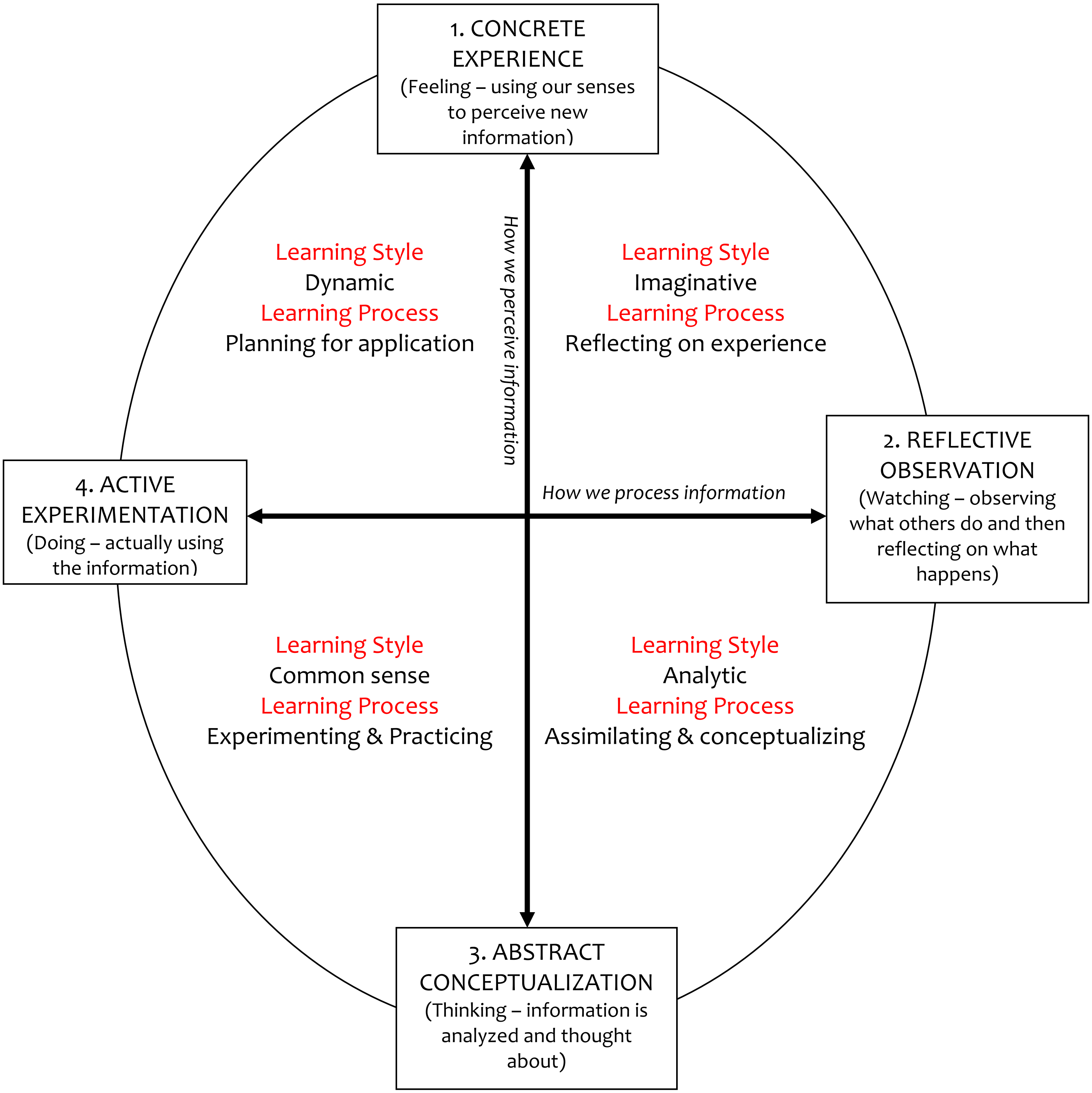
- *Reflecting on experience* – remind participants of what they already know by having them reflect on experiences that they have had. This process gets the participants thinking about the topic at hand, relating it to something they already know and allows for acknowledgement of the life that they have led.
    - Ask them to think about a time when…..
    - Can use pictures, music, videos to remind participants of a particular experience

- *Assimilating and conceptualizing* – this process is a more traditional lecture style where the facilitator is giving information to the participants. While this is inherently one-sided, interaction can be created by asking the participants to share their experience as it relates to the topic.
    - Slides, handouts, overheads etc.

- *Experimenting and practicing* – this is an opportunity for the participants to use what they have learned. It is important that these activities are closely related to the real world situations that the participants will be facing.
    - Role playing, case studies etc.

- *Planning for application* – participants now commit to ways of using the information that they have learned.
    - Creation of action plans

To maximize the amount your participants learn, it is important to include all four processes (in the order presented) in your session. While it's sometimes not possible to include all four learning processes in shorter sessions, every effort should be made to present a complete learning experience.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Common sense
Learning Process
Experimenting & Practicing
Learning Style
Analytic
Learning Process
Assimilating & conceptualizing
3. ABSTRACT CONCEPTUALIZATION
(Thinking – information is analyzed and thought about)

Experiential Facilitation Styles

Brooks-Harris (1999) has shown that there are also four different facilitation styles that improve the learning experience for your participants:

- *Engaging* – getting your participants to be a part of experiential learning
    - Create curiosity and excitement
    - Connect participants' past experiences with the new knowledge they are learning
    - Often use reflecting activities

- *Informing* – facilitator gives information
    - Provide new topic information - often use a lecture format
    - Process information about the group itself – within group activities
    - Encourage use of concepts to understand experience

- *Involving* – participants get involved through experimentation
    - Encourage learning by practice
    - Focus is on the learner not the facilitator
    - Increase interaction among the participants

- *Applying* – planning for how your participants will apply their knowledge
    - Create connections between classroom knowledge and the real world

Integrated Model of Learning Processes, Learning Styles and Facilitation Styles

Left Brain vs. Right Brain Learning

Decades of research have shown there is a distinct difference in how the right and left sides of the brain process information. As with many things, each of us has a dominant side which carries with it certain characteristics. Given that there is a dominant side, we expect that most of the time we will use that side to process information (especially under stressful conditions) and we expect that in certain situations, and with practice, we can learn to use the other side more effectively. According to Hopper (2007), the learning process is enhanced when we use both sides of our brain. Consider the following characteristics:

Left side	Right side
Processes from parts to the whole (details first, then the big picture)	Processes from the whole to parts (big picture first, then the details)
Rules	Intrinsic motivation
Structure	Creativity
Logic	Initiative
Linear	Visual
List maker – complete tasks in order	Random
Can express self in words well	Hands-on learner
Deal with the environment as is	Will try and change the environment
	Need to know why they are doing something

If you consider the world that we live and work in it becomes very clear that we need to be able to tap into the characteristics of both sides. However, most facilitators use a style that really focuses on the left side. By comparing the characteristics of the two sides we can see that in order to meet the needs of most of our participants, most of the time, we need to include facilitation methods that utilize both left and right brain learning.

Visual, Auditory, Kinesthetic Learning

Adults also have a preference to what senses they use to gather and process information. Specifically:

- *Visual* – these individuals learn best when they can see what you are talking about. Pictures, videos, diagrams, handouts, etc.

- *Auditory* – these individuals learn best when they can hear the information being presented. Lectures, audio recordings etc.

- *Kinesthetic* – these individuals learn best by doing. Role plays, practice scenarios, anything that is hands-on.

So as you plan your sessions keep these preferences in mind. Do you have visual components to your presentation? Auditory? Kinesthetic? A well rounded, well planned session will include all three preferences.

Characteristics of Adult Learners

Teaching adults is very different than teaching children. In fact, there is a separate field of study around how adults learn (andragogy). Some of the key points to keep in mind when teaching adults are:

- *Accountability* – most adults want to be accountable for their own learning. When possible, involve adults in the decisions (e.g. what type of activities do they want to do, suggestions for homework etc.)

- *Information needs to be relevant* – if adults do not see how the information that you are presenting is relevant to the world that they live/work in it will be challenging for them to stay engaged. This is especially important to keep in mind if you are facilitating to a group of people from a variety of age groups. During group work consider from time to time grouping participants into age groups, this will increase the likelihood that the discussions that take place will be more relevant to their stage of life.

- *Value their experience* – it is unlikely that you will know the backgrounds of your participants. Adults value being able to share their experiences and to learn from the experiences of others. Consider asking participants to share experiences they have had (that are related to the topic) and use that to lead group discussion.

- *Social aspect of learning* – most adults enjoy interacting in groups. If your facilitation style does not allow for interaction among the participants the overall learning experience will be affected.

Methods of Engaging Participants

It is not realistic to expect your participants to pay 100% attention 100% of the time. However, there are some things that you can do to increase how much your participants pay attention.

- *Mix up your facilitation techniques* – switch from lectures to activities to self reflection. It keeps the participants engaged in different ways which will hold their attention longer. We know that participants will be able to pay attention for approximately 20 minutes in a traditional lecture format (Snell, 1999). By using the experiential learning process you will use a variety of facilitation techniques which will shift the pace and energy of your presentation which will increase the ability of your participants to stay focused (ie. buzz groups, role playing etc. – see page 71 for more examples of interactive facilitation techniques)

- *Move around the room* – if you are physically moving as you facilitate it will capture your participants' attention much more than if you stand in one place.

- *Keep to the important information* – as a facilitator you have expertise in the content that you are presenting. Because of this it can be easy to give the participants much more information than they really need. Stick to the important stuff so they have the energy and attention to follow your entire presentation.

- *Repeat important information in different way, several times* – instead of repeating the same thing over and over try saying the same information in a variety of different ways throughout the course. If the message always sounds the same participants will tune you out and if you only say the message once it is unlikely that it will be remembered.

Facilitating Group Discussions

Facilitating an interactive learning experience for participants will often involve different variations of group discussions (both large groups and small groups). There are a few important points that you, as the facilitator, should keep in mind:

- Acknowledge contributions that participants make to the discussion
- Act as a moderator if participants start to cut each other off
- Clarify any vague statements that participants make – ask them to explain further
- Acknowledge participants whose body language is indicating that they may disagree with something that has been said (ie. "Susan, by the look on your face it appears that you have a different opinion. Could you please share what your thoughts are?")
- When the discussion is over, summarize the main points that came up and thank the group for their participation

If you have the participants working in small groups it is important that they know you are available to help them if they need it. The best way to do this is to walk around the room, spending a couple of minutes observing each group. This allows you to ensure that they are on task and allows them to ask you any questions that they may have. One word of caution, do not take over leading the group. You are merely there to observe and offer help if it is needed. Sometimes, participants need to fumble their way through material. As long as they are going in the right direction let them go through the experience of figuring it out for themselves.

Pace of Delivery

When you are delivering a complex topic it is important that you are aware of how fast you are moving participants through the material. Complex topics can be ones that have many components or they can be topics that are completely new to the participants. As mentioned earlier, stick with important information. Try and eliminate the "nice to know" pieces, or consider giving participants that information in the form of a handout or website reference. As content experts it can be easy to forget how challenging some information can be when you are learning it for the first time.

Most topics that you will facilitate can be broken down into smaller pieces. Breaking a topic down is beneficial as it gives the participants smaller chunks of information to focus on and also makes your lesson planning a bit easier. When you break a topic into smaller parts you want to make sure that you present each part in a logical sequence, each subsequent part builds on what was just presented. Start with the simple concepts first and build up to the more complex ones. It is important that your participants know when you are moving on to the next piece, make sure that you tell them you are moving on or have your information labeled in such a way that it is clear when you are changing topics.

Facilitating to Multiple Levels of Participants

While it is generally not possible to meet all the needs of all your participants all of the time, you can do a really good job at meeting most of the needs, of most of the participants, most of the time. Facilitating to a range of levels of participants in the same class is a balancing act between keeping the more advanced participants engaged, while not losing the participants that aren't as knowledgeable. Here are some ideas:

- *Participant expectations* - make sure to go through what the participants' expectations are for the course from the very first day. This will allow you to let participants know if any of their expectations fall outside the scope of the course. Once that parameter has been set, if the advanced participants try to get into that content you can remind them that it is not within the scope of the course. This also gives you insight into areas that the participants are especially interested in; you may be able to expand these areas as you facilitate. One of the easiest ways to do this is to use the Burning Questions ice breaker:

    Participants are given several sticky notes and are asked to write down any burning questions that they have, what they want to learn, or what they want to experience by the end of the session. They then place their sticky notes on a flip chart at the font of the room and the facilitator goes through them all. This gives the facilitator insight into what the participants are looking for and also allows time to let them know if any of their questions/requests fall outside the scope of the course. Some students will struggle with this exercise as they haven't given much thought to why they are there. When that happens try asking them this question:

    What do you need to learn or experience by the end of this session for you to walk away thinking that it was worth your time and money to be here?

- *Group similar knowledge levels* - When putting together group activities try and put together participants who are at a similar knowledge/experience level. This way they can challenge each other in the dialogue and still be able to understand what is being discussed.

- *Match tasks with abilities* - When assigning topic areas for group work assign the more challenging topic areas to the participants with the greater level of knowledge/understanding.

Needs Assessment

Understanding why participants are taking your course can give you valuable insight into their motivations and perspectives. At the start of the course consider conducting a very simple needs assessment. When doing any type of assessment it is important to ask yourself what you will do with the information that you collect. If you aren't planning to actually use the information you should ask why you are collecting it in the first place. So, when you design your needs assessment only ask questions that will provide you with information that you will use. Some sample questions include:

- Why did you sign up for this course?
- What are your goals in terms of taking this course?
- What topics are you most interested in?
- What topics are you least interested in?
- Do you have any concerns or special needs?

The answers to these questions can help you to better understand your participants.

Different Learning Abilities

As a facilitator you may have participants who have learning disabilities within your sessions. While it is outside the scope of this manual to discuss learning disabilities in depth, some basic knowledge is important. If a participant tells you they have a learning disability find time to talk with them and find out what strategies/resources they need and what you can provide.

According to the American National Centre for Learning Disabilities (NCLD – www.ncld.org) a learning disorder is, "a neurological disorder that affects the brain's ability to receive, process, store and respond to information." Learning disabilities can affect a person's ability to listen, speak, read, write and do math.

Two of the more common learning disabilities that are seen in the classroom are dyslexia and attention deficit hyperactivity disorder (ADHD). The NCLD lists the following characteristics of each:

	Area of Difficulty	Symptoms include trouble with:	Example
Dyslexia	Processing language	Reading, writing, spelling	Letters and words may be written or pronounced backwards
ADHD	Concentration and focus	Over-activity, distractibility and impulsivity	Can't sit still, loses interest quickly

The most important thing to remember is that participants are in your course to learn. We have the responsibility, as facilitators, to support their learning in any way that we can.

Pre-Course Planning

Preparing to facilitate a course takes a lot of time and work. There are some fundamental steps that should be completed that will help ensure the success of your course.

1. develop your *learning objectives* – your overall goals
2. develop your *session structure* – the skeleton of your sessions
3. develop your *course delivery strategy* – the pacing for the sessions
4. develop your *lesson plans* – the muscle of your sessions

Even if you are facilitating a course that you have presented in the past, it is still a good idea to review the fundamental steps to see if anything needs to be changed.

1. Developing Learning Objectives

The first fundamental step is the development of the learning objectives. These are statements that detail what the participant is expected to achieve as a result of completing the course. These statements should follow the S.M.A.R.T. principle – specific, measureable, attainable, relevant and timed. These objectives help to ensure that the facilitator is clear on what the participants need to achieve and that the participants are also aware of these expectations. When creating lesson plans, the learning objectives can serve as filters to ensure that the information and activities presented are relevant to the skills and information that the participants need to learn.

Example – by the end of this session the participant will be able to verbally articulate five characteristics of how adults learn and provide an example for each in terms of how it impacts the design of adult curriculum.

Note: if you are facilitating a set curriculum often the learning objectives will be given to you.

2. Development of the Session Structure

The second fundamental step is to develop your session structure. This will become the skeleton of your session, a high level overview of how the session will play out.

Well structured sessions have a beginning, middle and an end. George Bernard Shaw once said, "Tell 'em what you're gonna tell 'em. Tell 'em. Then tell 'em what you told 'em." This process actually works really well. You set them up for what's to come, you tell them what they need to know and then you remind them of what they learned.

- *Introduction* (beginning of your session) – This is your chance to grab their attention and spark their interest, tell them what you are going to tell them. Discuss what the topics for the session are and explain that this will be an interactive learning experience. This is also an important time to do an ice breaker activity (see page #87) with the participants. Ice breaker activities help to:

  - relax participants as they get to know other people in the room
  - increase the energy in the room
  - get participants involved right from the start
  - identify different perspectives

  These activities can also be used during the session as a way to increase the energy in the room, switch gears between topics, etc.

  When you are teaching a multiple session course, the start of subsequent sessions is also a good opportunity to review material that was previously covered. This can be as simple as asking the group questions, or you could use an interactive teaching technique (see page 73). This review gives you and the participants an idea of how they are doing in terms of learning the content. You may see that there are topic areas that they are really struggling with which allows you to look at other ways to help them learn it.

- *Content* (middle of your session) – Within the content component of your session you will likely have several topics, this is where you tell them what they need to know. When teaching each topic you should include the following three steps from Kolb's experiential model:

  - *step #1* – reflecting on experience (e.g. getting participants to share what they already know on the topic through brainstorming)
  - *step #2* – assimilating and conceptualizing (e.g. delivering information through a lecture)
  - *step #3* – experimenting and practicing (e.g. use of different interactive teaching techniques, see page 73 for examples)

As mentioned previously, adults need the information that they are learning to be connected with their life outside the classroom. The greater this connection the greater the amount of learning will be and the greater the application of that learning will be (Delahaye, 1999).

- *Closing* (end of your session) – briefly recap the topics that were discussed, tell them what you have told them. This is the time for the participants to plan for how they are going to apply this new information. This component of your session includes the fourth step in Kolb's model.

    - *step #4* – planning for application (e.g. participants create an action plan in terms of how they will use this new information – see the next page for an example). This application increases the chances that transfer of learning will take place (see page # 20)

<table>
<tr><td rowspan="2">Introduction to session (attention grabber)</td><td>Kolb Step #1</td><td>Kolb Step #2</td><td>Kolb Step #3</td><td>Kolb Step #1</td><td>Kolb Step #2</td><td>Kolb Step #3</td><td>Kolb Step #1</td><td>Kolb Step #2</td><td>Kolb Step #3</td><td rowspan="2">Kolb Step #4 (closing - planning for application)</td></tr>
<tr><td colspan="3">Content (topic A)</td><td colspan="3">Content (topic B)</td><td colspan="3">Content (topic C)</td></tr>
</table>

Sample Closing Activity - Preparing for the Application of Learning (Cafferela, 2002)

1. Briefly describe an educational program you recently attended
2. Complete an individual plan, as outlined in the following chart, specifying how you will apply what you have learned.

	Individual Action Plan
List knowledge; skills; problem solving and finding capabilities; and/or attitudes, values, feelings learned.	
Specify when, where, and how you want to apply what you have learned.	
Name people who could offer assistance and support.	
List other resources that might be helpful (such as books, training programs). Specify how you will know you are successfully using the new knowledge; skills; problem finding and solving capabilities; and/or values and attitudes.	
Specify a timeframe.	

3. Review this plan with at least one other person and make changes as appropriate.

Transfer of Learning

Caffarella (2002) describes transfer of learning as "the effective application by program participants of what they learned as a result of attending an education or training program." In the document, Transfer of Learning – Planning Workplace Education Programs, it is stated that over 1 billion dollars is spent annually in staff training and development with no more than ten percent of that investment resulting in knowledge transfer to the job. So it is critically important that as a facilitator you plan transfer of learning or application activities. Through the use of experiential learning practices and transfer of learning activities you can dramatically increase the amount of information your participants are able to effectively apply to their lives outside of your course.

Sample Techniques to Facilitate Learning Transfer (Caffarella, 2002)

- Individual learning plans.
- Mentoring – connect with a person with more experience.
- Job aids – written checklists, charts, sample templates etc.
- Applications notebook – keep note of ideas that worked and those that didn't. Reflect on the reasons that were behind the outcomes.
- Transfer teams – teams of people who are at the same course meet regularly after the course has finished to assist each other in applying what they have learned.
- Follow-up sessions – sessions that are done in person, over the phone etc., that bring all the participants back together to reinforce what they have learned in the course.
- Chat rooms – the creation of a chat room for the participants will give them a venue to share challenges, ideas and support each other in the application of new information.

There are many factors that influence how much transfer of learning will occur, many of which will be out of your control. But, by being aware of the need for transfer of learning you can deliberately create your course to use as many tools as possible to support your participants in applying what they have learned into their lives.

3. Course Delivery Strategies

The third fundamental step is to decide on the structure for delivering your course. Here are some thoughts to keep in mind:

- *Weekend courses*
  - Pros – participants may be fresher as they have not already had a full day of work/school before coming to your course. Course is completed in a shorter timeframe which is often appealing to participants
  - Cons – More content is covered in a more condensed schedule which decreases the opportunity for reflection on learning and processing of information

- *Multiple week courses*
  - Pros – participants have the opportunity to reflect on the information, formulate questions, and work with the information presented.
  - Cons – course takes longer to complete, some participants see this as a negative

- *Daytime sessions*
  - Pros – participants have not already had a full day of work/school, may be more alert
  - Cons – can be more challenging to locate a venue. Participants may have to take time off of work, miss school, in order to attend

- *Evening Sessions*
  - Pros – most participants can attend these sessions with little disruption to school/work
  - Cons – makes for a really long day for those working or in school. Learning later in the day can pose challenges for the participants in terms of staying alert, focused and interactive

- *Combination sessions*
  - One evening and one weekend session per week (ie. Wednesday night and all day Saturday) – this allows for the course to be completed in a shorter amount of time while still allowing the participants time to reflect and process. Lighter material can be covered in the evening session while more in depth material can be covered during the day session

When deciding on the location and times of your course keep in mind travel time, transportation access and what other events/activities may be going on at the same time that your participants may need/want to participate in (ie. it would not be advisable to host a facilitator training course for fitness professionals the same weekend a fitness conference is being held).

4. Developing Lesson Plans

This is the fourth fundamental step. A lesson plan is essentially a document that, for a particular session, lists what information you will be presenting and how you will be presenting it. If you are facilitating a set curriculum in which there are topics that must be covered, lesson plans are a good way of ensuring that you have "scheduled" all of the required information into your course. Lesson plans are a resource for you as a facilitator; it is not something that you give to your participants. While the lesson plan focuses on scheduling all the components of your session it is important to remember that you also need to be flexible. As you are facilitating you may deviate from the lesson plan, and sometimes this is needed. The most important aspect is that you recognize that you are deviating and you take any necessary steps to ensure that the participants leave the session with a complete experience.

Think of your lesson plan like a roadmap. It tells you where you are starting, when to change direction and where you will end up. In this respect they are also a good tool for when the class takes a detour so you know where to come back to.

What do you include in your lessons plans? That's up to you, think of them like a cheat sheet that keeps you on track while you facilitate. Here are some ideas:

1. ***attention grabber*** – how will you get participants attention and get them excited and curious about the session? Start with a quote, statistic, question or story to get your participants' attention right from the start

2. ***topics*** - what will you be facilitating for the session. Focus the majority of your session time on the "must know" information and only include the "nice to know" information if time allows. As a general guideline, it is suggested that heavier, more complex content be presented earlier in the day when participants have the most energy and attention. Typically participants will be low on energy right after lunch, this is a good time to do some interactive activities where they get up and move around.

3. ***facilitation method*** – what methods will you use to relay the information (see interactive facilitation techniques pg. 71 for ideas)

4. ***room set-up*** – what will the lay out of the tables and chairs be? If you are using props where will they be placed?

5. ***facilitator position*** – it is easy to fall into the trap of just standing at the front of the class. Facilitator position reminds you to change your position within the room, to share personal stories etc.

6. ***resources/supplies*** - list any items that you will need for the session – handouts, props, projector, stereo, etc.

7. ***time*** - estimate how long each topic/activity will take

8. ***closing activity*** - develop a closing activity that will wrap up the end of each session (quiz, group discussion about the topics presented, Q&A session etc.)

9. ***homework*** – if you are planning on assigning homework include it in your lesson plan

When designing your lesson plans consider:

- Did you follow the experiential learning model (page 16)?

- Did you include activities that are relevant for the various learning styles (auditory, kinesthetic, visual)?

- Did you change the presentation method every 20 minutes?

It is important to remember that learning is not just about acquiring new information, it is also about the experience that people have as they learn. The environment you create, the activities you design, will all impact the experience that your participants have.

A sample lesson plan is located on page #41.

Course Outline

The final fundamental step to preparing to facilitate a course is the creation of the outline. The outline is a resource given to the participants that lists important information for them to know. It may include:

- dates and location for the course
- facilitator's name and contact information
- a list of all sessions and what topics will be discussed in each, including any homework assignments
- any resource materials that the participants will need

Outlines are the participant's roadmap. It shows them where they are going and what is coming next. On occasion you will have individuals who like to read ahead, this way they know what to prepare for next.

A sample outline can be found on page #42.

Sample Lesson Plan

Course: Leadership Development			Date:		
Chapter/Main topic: Effective Communication					
Attention Grabber – Group Brainstorm: Why is effective communication important?					
Time	Topic	Room set-up	Facilitation Method	Facilitator Position	Resources Required
9-9:10am 10 minutes	Verbal Communication (page 142)	Tables and chairs in horseshoe shape	Lecture on the components of verbal communication	Stand at the laptop	Laptop, projector, screen
9:10-9:15am 5 minutes		Tables and chairs in horseshoe shape	Video – Ferris Bueller's day off – demonstration of poor verbal communication (10:48 mins)	Sit off to the side	DVD, speakers, laptop, projector
9:15-9:20am 5 minutes	Non-verbal Communication (page 143)	Small groups spread out around the room Can use hallway also	Small group activity – brain storm components of non-verbal communication and present back to the class	Roam around the room Share 1 of my experiences with non-verbal communication	Flip chart and markers
9:20-9:35am 15 minutes (10 mins to prepare, 1 min each group to present)		Small groups spread out around the room Can use hallway also	Group activity – create a 1 minute skit where non-verbal communication conflicts with the verbal message, present back to class	Roam around the room	
9:35 - …….		………	……..	………	
Closing activity – each participant shares one thing that suprized them in the content					
Homework – read pages 14-34					

Sample Course Outline

BCRPA Train the Trainer Course

- Friday September 26, 2014 (5-9pm)
- Saturday September 27 (9-5pm)
- Sunday September 28 (9-5pm)

Location: BCRPA Office
- 301-470 Granville Street, Vancouver,BC
- Press 104 on the buzzer at the main door
- Parking is $5 per day in the main lot
- Feel free to bring snacks

Facilitator:
- John Smith , 604-629-0965
- jsmith@bcrpa.bc.ca

Resources Needed:
- BCRPA Train the Trainer Manual – will be given out on the first session
- Examples of your own lesson plans that you have previously used

Session #1 – Friday September 26 (5-9pm)
- Role of the Facilitator
- Homework – prepare a 15 minute presentation on a topic of your choice for Sunday

Session #2 – Saturday September 27 (9-5)
- Adult Learning
- Pre-Course Planning

Session #3 – Sunday September 28 (9-5pm)
- The Learning Environment
- Teaching skills

Presentations (15 minutes each)

Time Management

Managing your time is often a challenge for facilitators. Being able to balance between allowing enough time and space for participants to engage in the learning process and getting through all your material is an art. With practice, and the use of different tools, this is a skill that can be learned and developed. Effective use of time is especially important to adult learners, if they feel their time is being wasted or that the facilitator is not keeping the group on track they will get frustrated and start to disengage from the group.

Time Management Suggestions:

- *Make sure you have a watch* (or there is a clock on the wall that you can easily see) - Avoid using the clock on your cell phone. Looking at your cell phone can be easily misconstrued as you checking messages.

- *Follow your lesson plan* – your lesson plans are a great tool to help keep you on track. Have a copy close by and refer to it often. There will be times where you decide to veer away from your lesson plan which is fine, as long as it is a conscious choice, not a result of poor time management.

- *Put a time limit on discussions* – tell the participants that you will have 10 minutes to discuss a particular topic and at the end of the 10 minutes you have to move on. This works especially well for hot topics. The use of a timer with an alarm is a great tool so that you don't lose track of the time.

- *Parking lot* – during the very first session put a piece of flip chart paper on the wall with the heading "Parking Lot". Let your participants know that if topics come up that are not directly related to what is being discussed that it will be put in the parking lot. If there is time later in the course those topics can be discussed. If there isn't time then you, as the facilitator, may be able to suggest resources where the participant can get more information on their own. The parking lot is a great way to acknowledge questions and comments without allowing them to derail the class.

Small group dialog - If the discussion is getting a bit heated you can stop the class for a moment, ask the participants to write down their 2-3 main ideas on the topic and then have them share in partners or small groups.

The Learning Environment

Do you remember what the first day of school was like? Who will you sit with? What will the teacher be like? How hard is it going to be? Many of your participants will feel the same way when they first enter the room. This is one of the reasons why having a well thought out start to the course is so important. At the start of a course, participants are interested in learning information about course content, objectives and expectations (Renner, 2002). They are also interested in the background of the facilitator, background of the other participants and the reasons why individuals are taking the course (Renner, 2002).

Participants need to know what to expect and that the environment is safe, that as the facilitator you will ensure that you do what you say you will do. and that you will maintain the safe environment. Lots of your participants may have fears about being in your course.

The curiosity of the participants and the need to create a safe environment are two great reasons to always start your first session with an ice breaker (see page 87)

Emotional Environment

One of the tools that you can use to help create and maintain a safe environment is the development of ground rules. Take a few minutes near the start of the class and brainstorm with the group some ground rules that everyone agrees to follow and that you, as the facilitator, agree to enforce. By involving the participants in the creation of the ground rules they will be more likely to abide by and support them. Examples may include:

- only one person speaks at a time
- if you have a question ask it
- class starts and ends on time (as do breaks)
- all ideas and thoughts are respected
- what is said in the room stays in the room

If you do not maintain a safe environment, if the participants do not trust you and their classmates it will be difficult for them to fully participate in the class.

Physical Environment

The physical environment that individuals learn in will have a great impact on their ability to stay focused. It is important not to underestimate the effects that the physical environment can have. For example:

1. *room temperature* – a room that is too cold will be distracting for participants just as a room that is too warm will likely have them feeling sleepy. It is important to find out how to adjust the temperature of the room you are using and if you are not able to adjust it, notify the participants accordingly (ie. If you know the room is always cold suggest that participants dress in layers)

2. *Housekeeping items* – things that the participants need to be aware of at the start of the course/workshop
    a. Location of washrooms, emergency exits, water fountains

3. *External distractions* – there are sometimes things in or around the room you are facilitating in that could distract your participants. Some examples include:
    a. Windows – having participants face windows can be a fantastic way to make the room more enjoyable. However, if there are distractions that are visible through the windows (people, busy streets etc.) you may want to consider having the participants face in the opposite direction.
    b. Loud noises – on a break see if you are able to minimize the noises (ie. If it is another group next door, ask them if they could be a bit more quiet)
    c. Lighting – lighting that is too bright or too dark
    d. Other participants in the class having side conversations
    e. Room is messy or cluttered
    f. Participants arriving late
    g. Air quality – poor air circulation will leave the room feeling stuffy and participants may start to feel lethargic
    h. Comfort of tables and chairs

4. *Placement of learning tools* – can the participants easily see flip charts and projectors? It is important to find out if you can tape your pieces of flip chart to the walls (make sure to use painters tape so that the walls are not damaged when the tape is removed. If there are existing pictures/artwork posted in the room ask if they can be taken down before your course starts.

5. *Give appropriate breaks* – it is good practice to offer a 5-7 minute break every hour. This allows participants to get up and move around. If you are using a lot of interactive teaching activities having a break every hour is not as important. If you are using a lecture this break is very important.

6. *Room Layout* - when you are setting up your room it is important to consider where you are placing any equipment that you will be using. Where will the flip chart stand go, where will you position the overhead projector or LCD projector? Once you have decided on a set-up, position yourself in the different corners of the room where participants will be sitting. Will they be able to see everything they need to see? Practice writing on the flipchart stand. Are you able to move easily from your projector to the stand? Which side of the stand is most comfortable for you to stand on? How big do you need to write so that people at the back of the room can read your writing?

    If you like to move around a lot when you facilitate it is also a good idea to practice facilitating once all your equipment is set up. Are there any obstacles that may make it difficult for you to move around (electrical cords, tables etc.). By doing a dry run you may be able to re-position the room so that it is more conducive to your facilitation style.

How you lay out the room will also effect how the participants interact with each other. If the room is set-up in a traditional lecture theatre style (rows of tables and chairs), it will be difficult for participants to interact with each other but it will be easier for them to concentrate on you. In a semi-circle or horseshoe shape layout the participants can interact a little bit more now that they are able to see the other participants. They can still focus on you and they have the opportunity to make eye contact with other participants. If you have round tables this layout is fantastic for encouraging interaction among the participants, however it can be more challenging to facilitate as some participants will have to turn around to see you and there will likely be more side talking as you facilitate.

Tips on Creating a Fun, Safe and Interactive Environment:

- Have quotes, pictures, words posted around the room that relate to the topics you are presenting
- Have music playing in the background as students enter and during breaks – creates comfort
- Have a piece of flip chart on the wall with the name of the session welcoming them (informs students know they are in the right place)
- Welcome people at the door
- Use participant's names (have name plates on the tables or name tags)
- Be excited about what you are facilitating. If you aren't passionate and excited about what you are facilitating your participants won't be either.
- Use inclusive language (us, we, etc.)
- Allow mistakes – let participants know that it's okay to make mistakes, this is part of the learning process. You may make mistakes also, when that happens, apologize, get it right and move on. Do not dwell on mistakes that you make.

Group Dynamics

When you bring together a group of people who will be interacting with each other (as we see in courses) that group will have a certain dynamic, or way of being. There are many theories of group dynamics. One of the most common theories is that of Bruce Tuckman. His theory highlights the different stages of development that a group will go through. The more a group of people work together the more prevalent these stages are. An awareness of these stages can assist you in understanding some of the challenges that the group may encounter.

Stage 1 – Forming (start of the session)
This stage relies heavily on the facilitator to lead the participants. The participants are unsure of their roles, objectives and of the other participants in the group. In this stage some participants will test the facilitator to see what will be tolerated and what won't.

Stage 2 – Storming
Participants in this stage are trying to find their place within the group. At this stage it is easy for participants to be distracted by the dynamics of their group (power struggles, cliques etc.) so it is important for them to stay focused on the task at hand.

Stage 3 – Norming
This stage relies on the facilitator to facilitate and enable the participants. The group now understands and accepts the roles and responsibilities of each member.

Stage 4 – Performing
In this stage the facilitator delegates and oversees the work of the teams. The members know what they are doing and why they are doing it. They do not require any participation from the facilitator. Once they have their task they are independent.

Stage 5 – Adjourning (closing)
When the course ends there is a process where the group disbands. The longer a group is together the stronger the need is for adjournment. By formally acknowledging the end of the course participants are given a sense of closure. If you do not do some sort of adjournment activity some students may leave the course feeling like something wasn't finished.

Different Types of Participants

There will be many different types of participants in your sessions. It is important that you create and facilitate an environment where everyone feels safe to participate. The longer a participant goes without speaking/interacting in class the less likely they are to. Hugh Phillips (2004) describes three categories that learners fall into:

- *Participants* – these individuals are active learners who contribute their knowledge and experience to the group. They want to be a part of the course.

- *Passives* – passives have a lack of interest in the course. They have low energy and can be a challenge to motivate. They are simply along for the ride.

- *Prisoners* – these individuals do not want to be in the course. They may be there as a work requirement or just be having a really bad day. These participants will be your biggest challenge as a facilitator.

It is important to note that the categories above are not static. Participants can become prisoners if the session is not meeting their needs and prisoners can become participants if they realize the value in the learning experience.

From time to time you will also encounter the challenging or difficult participant. By understanding some of the reasons for their behaviour you may be able to modify your facilitation styles and techniques to encourage more productive participation. If you allow participants to compromise the learning environment it will affect the whole group.

Here are some other examples of challenging participants that you may encounter:
- *Quiet participant*
    - Potential reasons - could be due to shyness, has no opinion on the topic, bored, mind is thinking of other things, doesn't understand the topic.
    - Potential solutions – ask the participant a simple question, put the class into small group discussions and assign the quiet participant in each group to report back to the class, recognize their contributions, speak privately to the participant to see what is going on, have a roundtable where everyone shares their opinion. Another option is to ask the class a question and then have the participants turn to someone beside them and share what they think the answer is.

- *Dominant participant*
    - Potential reasons – likes to have attention, wants to show how much they know
    - Potential solutions – ask other participants for their thoughts, thank the participant for their comments and tell them that you have to keep moving

ahead, suggest that they speak to you after class if they want to explore a topic further

- *Students talking while you are*
    - Potential reason – bored, wants to discuss something they do not have the courage to bring to the whole group, they disagree with something that was said
    - Potential solutions – ask the participant to share their thoughts with the whole group, move your facilitating position so that you are closer to those participants, ask the participants for their opinion on something that was just discussed/presented

- *The arguer*
    - Potential reasons – wants attention, are unable to constructively offer their suggestions, are upset by something that was said/presented, feel ignored
    - Potential solutions – respond to their comments not their attack, acknowledge the comments and either move on or open it up for group discussion, put in the parking lot if time is running out

Optimum Class Sizes

What is the optimum class size to have? The research is still out on that one. Some researchers have found that smaller sizes result in better learning while other researchers find no difference. While we may not know the answer to the optimum size question there are a few factors for you to consider as a facilitator. One of the most important aspects of your course is the interactive learning activities, so remember to consider the needs of your interactive activities when deciding on class size. For example, if you only have four people it will be difficult to break them into different groups for the purpose of sharing multiple perspectives. Conversely, if the group is quite large this may also make your activities more challenging to facilitate or too time consuming. Larger groups are also typically more challenging in terms of classroom management. More people, more side bar conversations, more questions etc. So it is really up to you to decide what your optimal class size will be.

Communication Skills

Effective communication skills are essential for a facilitator. Albert Mehrabian has been researching how people communicate since the 1950's. He developed the 7/38/55 rule in regards to verbal communication:

- 7% of meaning is in the words that are spoken
- 38% of meaning is in the way that the words are said
- 55% of meaning is in facial expression

While some researchers will debate the exact percentages the point is this, a lot of what gets communicated to other people is through non-verbal aspects of communication.

Non-Verbal Communication

A great example of non-verbal communication is the cashier at your local grocery store. They finish with their previous customer and then start ringing in your order. While looking down at the loaf of bread they are scanning they ask "how are you today?" They don't even lift their head to look at you when they say it! How genuine does this question appear to be? Does she really care how you are doing? If we are not aware of our non-verbal communication we too could fall into a trap of our messages not being perceived as genuine. Here are some things to consider:

- Eye contact - shows interest
- Facial expressions - show if you are happy, bored etc. Smiling is one way to increase engagement with your participants and to foster a safe, interactive environment
- Gestures – moving your body as you speak creates more interest and energy
- Body posture – sitting or standing with a slight forward lean will show an interest in what your participants are saying
- Quality of your voice – the speed in which you speak, the tone and the volume are all really important in changing the energy in the session. If you speak in a slow, quiet voice the energy in the room will decrease. Similarly if you speak with a loud, fast voice the energy will pick up. Match the quality of your voice with the content of the message that you are delivering.

Active Listening

Part of being an effective communicator is knowing how to actively listen to the other person. This is true for one-on-one conversations and for interacting with participants in a group setting. Whitworth (2007) describes three different levels of listening:

- *Level #1 – internal listening*. In this level our attention is on our thoughts, judgments, feelings, conclusions etc. It is all about us. As a facilitator you may be thinking about the next activity or the next topic that you need to present, you are not focused on what a participant is saying to you.

- *Level #2 - focused listening*. Here, you are completely focused on the participant. You are not thinking about anything else except what the participant is communicating to you.

- *Level #3 – global listening*. In this level not only are you listening to the participant but you are also keenly aware of what is going on in the environment around you. You take in information from all of your senses. A clear example of level 3 is the saying "you could cut the tension in the room with a knife." When people use this phrase they have experienced level 3 listening, they have picked up on an energy that was in the room.

Level 2 is what we would call active listening; you are focused on the person who is communicating with you. As a facilitator, being able to also listen at level 3 is important. It will give you clues on how your students are doing and how intact your positive learning environment is.

Giving Feedback

Depending on the topic that you are facilitating you may need to provide participants with feedback on their performance. Feedback should only be given when the intention is to truly help a person grow and develop. When giving feedback remember the following:

- Focus on observable behaviours – if you were watching this person on video what would you be able to observe. Here is a poor example of giving feedback:

  "Tom, when you facilitate you always look angry"

  There are a couple of challenges with this statement. The first is that the word "always" was used. Be careful not to generalize your observations or use absolute terms such as always and never. The second challenge is that saying that someone looks angry is an opinion, not an observable behaviour. When we tell people our opinions about them there is a good chance that they may become defensive in which case the lines of communication will be broken. We can rephrase this feedback so that it is more effective:

  "Tom, when you were facilitating this morning you rarely smiled or made eye contact with the participants."

  In this version we have stuck to the observable behaviours, lack of smiling and eye contact. Chances are Tom won't take offense to this or argue the feedback that you are giving him which allows for the lines of communication to stay open.

Receiving Feedback

Receiving feedback on your facilitation skills is vital to your professional growth and development. Each time someone gives you feedback, see it as an opportunity to learn. Unfortunately, there are a lot of people who do not know how to give feedback in a constructive way. It is important that you do not get defensive. See it as an opportunity to be curious. For example, you overhear a participant commenting on how stupid the last activity was. Be curious, why did they not see the same value in the activity that you did? What about it didn't work for them? What would they have done differently? When you get curious about people's experiences and perceptions you open up a world of insight into how others are experiencing what you have to offer. Their perceptions are their reality.

Keep in mind, we can't meet all of the needs of all of our participants all of the time. But if we take the time to understand them a bit better they will also come to understand us better.

Professionalism

Professional Development

Facilitation is like any other skill, the more we practice the better we get. And, as with many things, the more we learn about facilitation the more we realize how much we don't know. While you need to have a certain level of content knowledge (and you need to keep this knowledge up to date) you also need to keep your facilitation skills up to date. It can be difficult to locate training courses for facilitation; however, there are lots of resources available that can give you new ideas (see resource section page 92).

After each time you facilitate take some time to reflect on what worked well in the session and what didn't. As you identify these different areas think about what made it work and what made it not. Was it your facilitation style? Did you not address all the different learning styles? Was it the dynamics of the group? As you complete this debrief make some notes so that the next time you facilitate you know what to do the same and what to do differently.

You can also learn a lot by observing other facilitators. Next time you hear someone raving about an amazing presenter see if you can find another workshop that they are presenting and sit in. It is amazing how much you can learn about facilitation by watching others who excel at it.

Professional Conduct

As a facilitator it is important to always conduct yourself in a professional manner in your written, verbal and in-person interactions. How you conduct yourself is not only a reflection of you, it is also a reflection of your industry and the business that you represent. While much of this may seem like common sense, it can be easy to become too comfortable as a facilitator and lose your level of professional conduct. Things to consider:

- always arrive early to ensure that your room is ready. If you know you are going to be late contact someone who can relay that message to your participants
- ensure that your participants have all the information they need to arrive on time and be prepared for your session
- do not discuss confidential information at any time
- treat all participants fairly and equally
- do not share your personal opinions of other people/businesses if it is not positive
- accept constructive criticism and see it as an opportunity to grow
- deal with sensitive issues in a private setting, not in front of the class
- be understanding of mistakes that others make
- listen to others – seek first to understand and then to be understood (Stephen Covey)
- apologise for any errors or misunderstandings

- speak clearly and with appropriate language
- if you commit to do something, then follow through with it
- avoid conflicts of interest
- be aware of your hygiene and attire

Confidentiality

When a safe learning environment is created your participants will start to open up and share information with the group. As suggested earlier, create an agreement with your participants that what is discussed in the room stays in the room. Out of respect for everyone in the room confidentiality needs to be maintained.

Assessing Participant Learning

Assessing student learning has many purposes. The most traditional is to decide whether or not a participant has learned enough information to pass the course. The other is to check how well your facilitation methods are working as the course progresses. If after a couple of sessions you asses how your participants are doing with the material and you realize that the majority of them are really struggling, this gives you an opportunity to change how you are facilitating. Methods to assess learning will be discussed later in this section.

Creating Ways to Assess Learning

How we assess learning is a very involved and complicated process. There are however, some basic principles that we can use that will give us a relatively good understanding of how your participants are doing in the course. When assessments are used to indicate passing or failing a course it is important that those assessments be properly structured. It is recommended that in those situations your assessment methods be reviewed by an education faculty at a College or University.

Benjamin Bloom (1956) developed a group of learning behaviour categories that are used today in the design and assessment of learning. For example, if you wanted to see if a participant had memorized a set of terms you would be asking questions in the knowledge category (level #1). If, on the other hand, you wanted to measure how well that participant could relate those terms to another set of terms you would be asking questions from the analysis category (level #4). As you go higher into the levels the understanding required by the learner also increases.

If all we ever do is ask participants to recall information then all we ever assess is their ability to acquire knowledge. If we want to assess their ability to dissect or integrate information we need to measure their ability in a different way.

Bloom's Cognitive Learning Behaviour Categories:

- Level #1 - Knowledge (recall of information) – ask questions like list, define, tell, quote
- Level #2 - Comprehension (understanding of information) – discuss, describe, summarize
- Level #3 - Application (using the information) – apply, show, relate, solve
- Level #4 - Analysis (dissecting the information) – relate, differentiate, connect, separate
- Level #5 - Synthesis (integrating the information) – plan, design, combine, categorize
- Level #6 - Evaluation (assessing the information) – compare, contrast, explain, conclude

So, as you can see, before deciding what kinds of questions to ask our participants we first need to know what level of understanding we are assessing them at.

Given that people learn information in a multitude of ways, we need to also assess their knowledge in a variety of ways. Barbara Gross Davis (1993) offers these suggestions on different test formats:

Formal

- *Multiple choice* – can be used to assess a variety of topics within a short period of time. The exams are also easy to score but challenging to create.

- *True-False tests* – participants have a 50/50 chance of guessing the right answer so this format is not as reliable.

- *Matching* – good for assessing the student's ability to connect different pieces of information

- *Essay* – participants are able to express themselves in their own words. While these tests take longer to mark, it allows the participants to organize, integrate and interpret the material. Usually participants will be given several possible essay topics (only one of which will be on the exam) a few weeks before the exam so that they can adequately prepare.

- *Short answer tests* – these can range from answers that are only a couple of sentences long to those that are a paragraph. The benefits are similar to the essay format and they are quicker to mark.

Informal

- *Blank index cards* – give out the cards during the last 5-10 minutes of class and have participants answer one to two questions anonymously. This allows for the facilitator to make adjustments within the course should an area of concern come up. Sample questions include:
  - What was the most valuable experience for you today?
  - What could have been done better?
  - What are you the most clear on?
  - What are you the least clear on?

- *Minute paper* – participants write a one minute paper (handed in anonymously) in which they answer the following questions. This is a great tool for being able to see how your participants understood the material.
  - What is the most significant thing you learned today?
  - What question is uppermost in your mind at the end of today's class?
  - What was the 'muddiest point' in the lecture today?

- *Key concepts and ideas* – at the end of a particular topic ask the participants to summarize three to five main points about the topic. These summaries could be used in a small group discussion.

When collecting assessment information from your participants it is critical to celebrate your successes and to dissect your failures. As a facilitator you will fail from time to time. You may try a new activity that doesn't work or struggle with managing a group of challenging participants. There are countless ways that things can go sideways. When you do fail, take time to figure out what happened and what you could have done differently. This reflection creates space for you to learn from your mistakes which will make you a stronger facilitator.

Effective Questioning Techniques

As a facilitator one of the easiest ways to engage participants and to quickly assess if they are following the information is to ask questions. The quality of the question you ask will impact the quality of the answer that you receive. Asking closed ended (yes or no) questions can be appropriate, however keep in mind that those questions do not probe into the actual understanding of the material. It is also important to start your question with the topic of the question first and then the actual question last (Delahaye, 1998). For example:

- What are the four main styles of adult learning?

In this example the question was first (what are the four main styles) and the topic was last (adult learning). In this type of arrangement it is difficult for the participants to start processing the topic so that they can answer the question. Instead consider the following:

- In adult learning, what are the four main styles?

Now the participants know the topic right away (adult learning) and can start the process of retrieving that information from their memory to answer the question.

When you ask a question make sure that you allow 5-10 seconds of silence before jumping in with an answer. Many facilitators are uncomfortable with silence, so if a participant doesn't answer the question right away the facilitator does. Research shows that most facilitators answer their own questions within 1.5 seconds of asking them (Grasha, 1998). Instead, allow for 5-10 seconds of silence and if no one answers try rephrasing the question.

If you have participants who are not engaging ask them a question directly (make it a question that you think they are able to answer – like their opinion on something). Remember, the longer a participant goes without interacting with the group the less likely they are to interact.

Another tactic you can use when a participant asks you a question is to redirect the question back to the group. Ask the group what they think the answer is. This gets the participants more engaged and encourages them to use each other for resources.

When responding to questions Renner (2002) suggests keeping these tips in mind:
- Be aware of your body language, you do not want to appear uncertain or uninterested.
- When answering questions, address the whole class so that it doesn't appear that you are having a single conversation with one participant.
- Do not use the phrase "good question" as it implies that some questions are better than others, and we want all participants to feel their questions are valid.

- After hearing the question, repeat it so that the whole class can hear it. This ensures that you understood the question correctly and that all the participants know what was being asked.

Incorrect Responses

When a participant makes an incorrect statement or offers an incorrect answer it is important that you handle the situation in a way that encourages the participant to keep thinking versus feeling stupid. When the incorrect response is given acknowledge what is correct in what they said and what is incorrect. Then you can use phrases such as those listed below to help them get to the full answer.

- "Good. Now let's take it a step further"
- "Keep going"
- "Not quite, but keep thinking about it"

Responding When You Don't Know the Answer

There is a saying something to the effect of, *the more I learn the more I realize I do not know*. This is especially true for facilitators. There will be times when you are asked a question that you do not know the answer to. When this happens it is important to acknowledge within yourself that you do not know the answer, do not make one up. Instead, you could say, "That is a great question; I will do some research on that and let you know what I find out next session." Another option is to give the participant locations of resources (websites, books, etc.) where they can find more information.

Using Media

There are many different media applications that we can use as tools to create a more interactive environment for our participants. These applications are simply tools -- they are not required for an effective, interactive learning experience. This section explores some of the basic pointers for some of these applications. More resources are listed in the resource section.

Flip charts

- Need to be able to write quickly and clearly
- Make sure that you use flip chart markers (they won't bleed through the paper)
- Use bright colored markers that are easy to see (colors such as yellow can be difficult to see)
- Use painters tape when putting sheets of flip chart on the wall (it won't damage the wall when you peel the tape off)
- Use no more than 6-8 words per line, 6-8 lines per page (Lucas, 2000)
- Write down the content lightly in pencil first so you can make sure it all fits, then go over it with a marker
- Prepare as many flipcharts ahead of time as you can
- You can write small notes or reminders at the top corner of the page (lightly in pencil) that serve as reminders for information you don't want to forget. The pencil is light enough that your participants won't be able to see it.
- Master the "matador tear" – face the easel, grab the sheet at the bottom left hand corner as you step back slightly. Now pull the paper away and up tearing the sheet along the glued binding. This is something that you want to practice as it can take a few tries to get it right.

White boards

- Make sure you have proper markers and eraser
- Use bright colored markers that are easy to see (colors such as yellow can be difficult to see)
- If you want to refer back to the information that you have written down you may want to use flip chart paper instead.

Overheads

- Use large fonts (18 or greater)
- Upper case letters can be difficult to read – use upper and lower case
- Use a font that is easy to read
- Avoid having lots of information on the transparency

- Number your transparencies so that you are sure to display them in the correct sequence
- Using color can emphasize important points and add more interest to the presentation
- Always face your participants
- Have a blank sheet of paper so that you can cover up any sections of the transparency that you do not want the participants to see right away
- Ensure that there is a spare bulb available should one burn out

PowerPoint:

- Choose a font that is easy to read
- Use a combination of upper and lower case letters
- Use the 6/6 rule for each slide – no more than six lines of text with a maximum of 6 words per line
- The slides are for main points of your presentation – avoid placing all your information in the slides. This also helps to prevent you from reading the slides
- Include your company logo if appropriate
- Have a heading on each slide
- Ensure that your slides look consistent
- Use diagrams and pictures to help relay the information
- Free training on how to use Power Point is available at http://office.microsoft.com

Unfortunately, technical challenges do sometimes occur. So it is important to make sure you have any resources that you would need to teach, in case you don't have access to any media. You may want to bring flip chart paper, markers and a paper copy of your presentation. In the worst case scenario you would still have all the information you need to facilitate the session.

Appendix A

The Business of Facilitation

Many facilitators operate under their own company. If this is of interest to you there are several aspects of operating a business that you need to consider. This section is intended to highlight key areas and resources that you need to explore when setting up your own business.

Business Plan

If you are venturing into creating your own facilitation/presenting business you need to have a plan. Most of us have heard that when you fail to plan you plan to fail. Your business is no different. Creating your business plan is a process that will have you thinking about what it is your business does, where you want it to go, how you are going to get it there. Having a well thought out plan makes starting and growing your business much more manageable. The Small Business BC website (www.smallbusinessbc.ca) is a government website that has many resources to help you, whether you are just starting to think about creating a business, launching your business or growing your business (including how to develop a business plan). There is also information on business licenses and registering your business name.

Accounting

It is important that you speak with an accountant to ensure that you are running the financial aspects of your business properly. Your accountant can help you organize your finances, design efficient ways to manage your income and expenses as well as ensure that you are keeping the proper financial records. They will also be able to answer questions about paying taxes.

Insurance

There are two types of insurance that should be considered. The first is applicable to those individuals who are teaching BCRPA approved Fitness registration courses (Trainers of Fitness Leaders). Your insurance through the BCRPA as a TFL covers you when you are teaching courses. If you allow your BCRPA registration to expire your insurance coverage also expires. This coverage protects you in the case a student isinjured in one of your courses/workshops.

The next type of insurance is WorkSafe BC insurance. This insurance provides coverage for you (and your staff if you have employees) in the event of injury. There are different types of coverage available depending on the nature of your business. More information is available at www.worksafebc.com.

Cancelling a Course

There are times when it is necessary to cancel a course due to illness, low registration numbers, unexpected cancellation of the venue etc. It is important to recognize that participating in a course often requires the participant to make arrangements in their schedule so that they are able to attend. For this reason it is advisable to only cancel courses when absolutely necessary. When you cancel it is best to call the participants. Not everyone checks email daily and email systems can redirect emails into junk mail or spam folders. If you cancel a course you should provide all participants with a full refund (not credit towards a future course/workshop). Some reasons for cancelling a course:

- *Illness* – if you become ill and are not able to facilitate you have a couple of options. You can tap into your network of fellow facilitators and see if there is someone who can facilitate for you so that you do not have to cancel the course. You can also look at the possibility of re-scheduling the course. Participants need to be notified as soon as possible of any changes that will affect them.

- *Low registration numbers* – you will need to decide what the minimum number of participants is for you to run the course. Set a deadline to reach that minimum number (suggested that you set the deadline no later than three days before the start of the course so participants have due notice if it is cancelled). Sometimes you may chose to still run the course even if you do not meet your minimum numbers (service to the community, exposure for your business etc.).

- *Unexpected cancellation of a venue* – sometimes venues over book rooms. If this happens it is important to try and find an alternate site, if that is not possible then notify the participants as soon as you can to cancel the course. Let them know, in a professional way, that the venue double booked the room.

Refund Policy and Receipts

You will also need to develop your refund policy. How much notice does a participant have to give you in order to receive a full refund? Is there a cancellation fee? Do you offer a refund or credit towards a future session?

Your refund policy should be explained to the participants before they register for the course and a copy of the policy should be included with their receipt.

Many participants will be using the cost of the session as a business expense (either for their own business or for their employer) so it is important that you issue receipts. It is also a good idea to issue certificates of attendance as many people will need proof that they actually attended the event.

Marketing

The four P’s of marketing are a valuable structure to start you thinking of the many aspects of how you will market yourself. While there are more in depth marketing models out there, this one is a good place to get started.

Four P’s of Marketing

1. product
2. price
3. place
4. promotion

1. Product – as a facilitator what product are you offering? What is important about this product and why would people want to purchase it from you?

2. Price – how will you decide what price to charge for your product? There are a few things to consider:
   - length of your course
   - geographical location of where you are facilitating – do you have travel expenses to recover?
   - what is the need for this course?
   - what are other people charging for similar training?
   - what are your costs to deliver this training (room rental, materials etc.)

   Additional logistical factors that will influence what you choose to charge for your course include:

   - *Receiving payment* - do the participants pay you directly – if you have partnered with a business or facility they may prefer to process the payments and pay you your facilitation fee.

   - *Processing payments* - If you are processing all payments it is recommended that:
     - You have a cancellation and refund policy that is made clear to the participants before they register
     - You receive payment prior to the start of the course – if you decide that you need six participants for you to cover your costs and make a small profit and two of them don’t show up and you haven’t collected their payments you are now committed to running the course for the rest of the participants and you will actually end up losing money. Often times cancellation policies will give a full refund if the cancellation request is received within two weeks of the course starting. If it is received less than two weeks then a course credit is issued for a future training event. This

format prevents you from being in a situation of running a course when you do not have enough participants to cover your costs.

- *Partnering* - If you have partnered with a business/facility will you agree on a flat rate (regardless of how many participants) or a profit share?
    - Profit share – after all expenses are deducted the remaining profit is split between the two parties. Before deciding how much of the profit share you will request, consider the expenses that you will incur as well as what the partnering facility/business will incur, how much time each of you will put into the preparation and delivery of the course/workshop, what space/equipment you have access to etc.

- *Facilitating out of town* - when you have to incur all travel expenses consider having a no refund policy, issue a credit. Often times flights and hotels need to be booked weeks in advance and if participants cancel to the point where you would need to cancel the course you have already paid for your flight and hotel. On the registration form make it clear that due to travel costs no refunds will be issued, a credit will be issued for a future training event. This only works if you will be offering other training events in that area or if your business offers other services that the credit could be used towards that would be of value.

3. Place – where will you promote your services? Think about who your target market is and think about the places that those individuals are likely to be. For example, if you were delivering a session on aquatic pool standards where would those people likely be? You might consider sending the workshop information to various pools, contacting any associations that are connected with pool standards etc.

4. Promotion – how you promote your course can determine the success of it. How will people know about what you are offering if your promotion is weak? Here are some ideas:

    - Advertise on BCRPA's website (www.bcrpa.bc.ca).
    - Connect with local businesses and ask to put up a flyer or poster.
    - BCRPA magazines
    - Offer a free registration as a draw prize for an event or offer this as a draw at a local business if they put one of your flyers in each customer's bag or if they post flyers in their store etc. This gives your course exposure and allows the event/business to offer something free to their customers. You can also look at offering a discount coupon that can be given out at different businesses or events.
    - Community newspapers – often have an "events" section where you can post information for free or at a minimal cost.
    - Post flyers at local businesses/facilities.

- Websites such as craigslist.com
- Offer to provide a free seminar to groups that may have an interest in your course/workshop (e.g.Contact local Weight Watchers groups to offer a free mini seminar on a "barriers to activity" workshop and leave brochures with the group with information on your other courses/workshops)
- Connect with local colleges/universities – possibly post information in student areas, connect with staff to see if there is a class of students that you could speak to about your workshops/courses
- Fitness courses –
    - Make an appointment to talk to the managers of fitness facilities in your area. Talk about your courses, see if they can let their staff know.
    - Speak with fitness equipment companies – their staff may be interested
    - fitness clothing stores

<u>Finding a Venue</u>

There are many different ways to locate venues to facilitate your courses from. Often times there are facilities in your community that you do not think of or are not aware of. Here are some examples of facilities with meeting rooms or multipurpose rooms that could be available for rent:

- Community centers
- Churches
- Community colleges
- Local schools
- Local businesses that have a board room/meeting room
- Private fitness facilities – a group fitness or yoga/Pilates studio can become a classroom with the simple addition of some tables and chairs
- Arenas/ice rinks – often times these facilities have a meeting room
- Condominium complexes – often have meeting rooms or multipurpose rooms
- Hotels

When considering a venue keep in mind things like parking, public transit access, the quality of the room etc. The physical venue can have a significant impact on the learning experience of your participants.

Letters of Agreement (venue and guest speakers)

It is important that you have a letter of agreement when you are using someone else's physical space (e.g. renting a meeting room) or their expertise (e.g. as a guest speaker). The letter will help to ensure that all people involved know what the expectations are for both sides, reducing the risk of any complications and misunderstandings.

Things to include when booking a venue

- *Location and name of the facility* – street address and which entrance participants should use
- *Your name and address*
- *Facility contact person* – for the day of in case anything comes up
- *Dates and times* - remember to include set-up and take down time
- *Room set-up* – will the facility be providing any equipment (tables, chairs, AV equipment)? If so, how many and who is responsible for setting up the room? If the facility is responsible for setting up the room make sure that you include how you want the room set-up (ie. lecture style, small groups etc.)
- *Fee* – for the rental of the space and any additional costs (ie. renting equipment or tables/chairs, clean-up fees etc.)
- *Maximum occupancy of the room* – this is especially important in case of any emergencies.
- *Cancellation policy* – how much notice do you need to give to cancel and receive a refund? Is there a cancellation fee?
- *Food* - Is outside food permitted? This is important as participants may want to bring in their own snacks/lunches if you are not providing them.
- *Parking* – where, how much etc.

Make sure that you know the locations of emergency exits, first aid kits, nearest phone etc.

Things to include when booking a guest speaker

- *Location and name of the facility* – street address and which entrance they should use

- *Your name and address*

- *Date and time*

- *Room set-up* – how do they want the room set-up (ie. lecture style, small groups etc.)

- *Fee* – speaking fee, travel expenses etc.

- *Cancellation policy* – how much notice do you need to give to cancel and to receive a refund? Is there a cancellation fee? If they need to cancel how much notice will they give you? Will you charge them a cancellation fee?

- *Certificates of attendance* – if certificates are needed who will provide them?

When booking other facilitators for your course consider if they have the following (Caffarella, 2002):

- Content knowledge – facilitators are knowledgeable about their content area.
- Competence in the process of instruction – are they competent in the art of facilitation?
- Belief that caring for learners matters.
- Credibility.
- Enthusiasm and commitment.
- Personal effectiveness – are they organized and prepared?
- Ability to teach from the heart and spirit as well as the mind.

Appendix B

Interactive Facilitation Techniques

The context of this manual has been focused on experiential learning. One of the challenges that facilitators often face is coming up with new, interactive ways of presenting information. This section includes a variety of interactive facilitation techniques to help get you started. Here are some tips:

- When choosing an activity consider how many participants you have and the room that you are in.

- Make sure that you bring any needed resources/props with you to the session.

- It is important that you debrief each activity with the class before moving on. What did they learn, do they have any questions?

After giving participants instructions on how to do the activity, ask them this question before having them start, "Have I given you enough information to do this activity?" Often times if you ask if everyone understands or if anyone has any questions participants will be reluctant to speak up in fear of looking like they don't get it. But, if as the facilitator, you ask them if you have given them enough information it becomes easier for them to speak up because it is now about you the facilitator, not them, the participant.

When doing any type of interactive learning activity it is important that you keep the participants aware of how much time they have left as the activity progresses. By giving them a five minute or ten minute warning they can use their time accordingly to ensure the activity is completed. It is helpful to make sure that there is a clock in the room so that the class can track their own time.

Interactive Lecturing

This strategy encourages the participants to be active learners through discussion. (Snell, 1999). It allows for participants to experience small group learning while in a larger group (Snell, 1999). There are many ways in which a lecture can be made interactive:

- Divide the class into smaller groups and assign a topic for them to discuss. They can then present the highlights of their discussion to the rest of the class.
- Ask the participants questions during the lecture and allow time to briefly discuss their responses.
- Hold a brainstorming session.

Benefits

- encourages active learning
- increases participant motivation and attention span (Young, 2001)
- develops critical thinking, communication and problem solving skills (Snell, 1999)

Challenges

- it takes more time to get through material when interactive techniques are used
- the instructor needs to have strong facilitation skills to keep participants on track and to ensure all participants participate
- the physical set-up of the learning environment will need to be considered

Brainstorming

Brainstorming is a method where individuals or a group of people are presented with a clear challenge/problem/topic and come up with possible solutions. The information is not edited, all ideas are captured and the process should be fast (helps to limit the editing). Brainstorming encourages participants to think outside the box. In a brainstorming session quantity is more important than quality; there needs to be a time limit; ideas can then be put into categories, prioritized (e.g. select top 5 and then ranked); and someone needs to be writing down the ideas.

Benefits

- individual brainstorming – allows participants to let their own ideas flow without worry about what others may think
- group brainstorming – allows participants in the group to feed off of each others ideas and to build on them.

Challenges

- can be easy for students to dominate the brainstorming
- many of the ideas will be rejected in the end so it should be used for less complex topics

Buzz Sessions

These sessions are small group discussions (maximum 3-5 people) that are interactive. The group is given a topic and a set amount of time to brainstorm their thoughts. They then present their ideas back to the larger group where further discussion can take place.

Benefits

- allows participants to be exposed to other points of view
- useful when introducing a new topic to get the participants thinking in that area
- participants develop questioning skills
- sharing of ideas can occur in a less intimidating environment
- facilitator is able to see what level the participants are discussing the topic at and their group dynamics

Challenges

- topics need to be relevant to the participants
- it takes additional time
- the topic must be clearly communicated
- participants' conversations may go off topic
- may not be constructive if the participants do not have a sufficient level of understanding/knowledge to support the conversation

Case Studies

A real or fictional example is presented to the participants. Often in case studies there are multiple courses of action that can be taken (which some participants will struggle with). Case studies can be done individually or in small groups. It is important that any key information that they need to create an action plan is provided. If there is not enough information the participants will become frustrated. Renner (2002) suggests the following:

- write the case study in the form of a story
- give the characters real names – this makes it easier for participants to discuss the characters
- quote the characters – instead of telling the story of the case study only from an outside perspective create quotes from the characters. For example, Mary's response to the activity was, "this was a complete waste of time, I have no idea what we were supposed to learn." This makes the case study more real.
- Use realistic details
- Be descriptive – remember, you are telling a story
- Present information in the order that it occurred – avoid bouncing back and forth with the timeline

- Provide lead questions – now that the participants have read the case studies what questions do you want them to answer, what problems need to be solved, what recommendations are needed?

Benefits

- participants can apply theoretical knowledge to a real world scenario
- participants can explore multiple perspectives when discussing in a group
- participants can draw together many different pieces of information that have been presented in the course

Challenges

- takes time (preparation and class time)
- not effective for delivering large amounts of new information
- facilitator needs to ensure that all participants are participating and that participants don't jump too quickly to a solution
- participants need to have a base of knowledge that they can draw from

Word Association

Ask participants what words/phrases come to mind for a particular topic – write these down on a flip chart. You can also go through the list with the class and let them know if there are any ideas that were listed that you won't be covering. For example:

What words or phrases come to mind when you think about room set-up?

Benefits

- gets participants thinking about a topic
- good auditory and visual technique

Challenges - none

Participant Expectations

Participants are given sticky notes and asked to write down information they want to learn or experiences they want to have by the end of the course (one "want" per sticky note). The sticky notes are put on a flip chart at the front of the room and the facilitator reviews all the notes with the class. This same exercise can be used to list fears that participants may have about a particular topic. Naming the fears and talking about them as a group can help reduce the anxiety that participants have.

Benefits

- allows the facilitator to have a sense of what the participants are looking for
- creates an opportunity to let participants know if any of their requests will not be covered in the context of the course

Challenges - none

Independent Study

This is a great activity for information that is not very technical. Have participants read a section of the manual (or a handout that you have provided) and write down any questions or key points that stand out for them. Give them a reasonable amount of time to finish the reading and then open up the discussion for the participants to share their questions, revelations etc.

Benefits

- allows participants to work at their own pace
- great for independent learners

Challenges

- participants who lose focus easily may struggle if the information they are reading is too long

Demonstrations

Demonstrations can range from showing equipment or materials that are used to showing a particular way of doing something. These demonstrations can be done by the facilitator or through a guest speaker, video tapes etc.

Benefits

- participants are able to see how a task/skill is completed
- provides a different style of learning information, adding variety

Challenges

- takes time (preparation and facilitation)
- not a very interactive teaching method (participants just observe)

Small Group Discussion
Participants are placed into smaller groups (3-5 participants) and given a particular topic to discuss.

Benefits
- participants become active participants in working with the information that they are learning
- develops problem solving and critical thinking skills
- participants have an opportunity to share their own ideas and how they connect to the material

Challenges
- takes time
- if participants are not used to this format they may feel uncomfortable not being led by a facilitator
- requires effective communication skills which some participants may not have

Games
Structured experiences that allow the participants to work with the information they have learned in a different way. Games can be in the form of role playing, or more structured games such as jeopardy, charades etc.

Benefits
- allows for active participation from the participants
- role playing creates an opportunity for participants to practice a specific skill in a relevant scenario
- participants can draw upon their own experiences as a resource

Challenges
- participants must see the benefit of the game in order to fully participate
- takes time to plan and facilitate

Questioning
A method in which the facilitator asks thought provoking questions to the participants. Questions can be probing, redirection or problem solving.

Benefits
- encourages participants to actively participate
- challenges participants to think of information in a different way
- promotes critical thinking and problem solving

Challenges
- often times there will be more than one right answer, which may frustrate some participants
- quiet participants may not participate
- facilitator needs strong facilitation skills to ensure that participants feel supported and that the discussion stays on topic

Story Telling
This is a way of sharing knowledge or drawing meaning from an experience in the way of a story or metaphor. These stories can come from personal experience, history, film etc. Weimer (2002) points out that instructors must be clear about their reasons for using storytelling: use stories for the right reasons, not self-serving ones. It can also be useful to have participants use story telling to expand their learning experience.

Benefits
Green (2004) describes four purposes for stories:
- stories create interest;
- stories provide a structure for remembering course material;
- stories are a familiar and accessible form of sharing information;
- telling a story from experience can create a more personal student-teacher connection (p. 38).

Challenges
- facilitators need to have effective verbal communication skills
- the story must somehow connect, reinforce or expand on course information

Jigsaw

A method of group discussion that creates a less competitive environment for participants to interact with each other. A topic is divided into a number of segments (5). Five small groups are created with each one being assigned one of the divided topics. The small group discusses and learns their topic thoroughly (this could be done within a class or given as a homework assignment). Then 5 new groups are created so that there is one participant expert from each topic area in each group. Each member of this new group teaches the rest of their group their topic.

Benefits

- participants in small groups become an expert in one new concept and then teach their area of expertise to another group.
- encourages cooperation versus competition

Challenges

- facilitator needs to ensure that the groups stay on task

Reflective Journaling

It is a guided method that helps students go through the four stages of Kolb's learning model as described by Brand & Hubbs (2005). Each journal entry should be brief with the entire process taking no more than 10-15 minutes. The structure for the journaling is:

- participants describes an experience (stages 1 and 2)
- participant explores what the meaning of the experience was (stage 3)
- the participant applies new meanings, interpretations or understandings of the experience (stage 4)

Another structure that you can use is to ask participants to answer the following questions (Renner, 2002):

- What questions do you have after completing today's material?
- For each question list two key concepts that you can pull out
- How can you find answers to these questions? List two ways for each question

Benefits

- strengthens the experiential learning process
- allows for independent study

Challenges

- some participants may not see the immediate value in reflective journaling. This is one of the reasons why the structure is important
- takes time

Picture Presentation

Various images that relate to the topic being presented are placed on a wall or delivered through a slide show, power point presentation etc. Participants are asked to share what thoughts come to them as they look at the images.

Benefits

- good for visual learners
- allows for the participants to think outside of conventional ideas

Challenges

- can be time consuming to find the right pictures
- it may take participants a little practice to get used to this activity
- it is easy for the conversation to divert from the topic at hand

Where are You?

Participants are asked to respond to a statement or question. Depending on their answer they move to a particular place in the room. For example, the statement might be, "Everyone who has siblings stand on the right side of the room, those who are a single child stand on the left." Then the participants would move to their respective location. This can be used as an ice breaker activity to learn some basic things about each other. It can also be used to show how many participants have had a particular experience or to see their opinion on a topic. For example, the question is, "Do you believe that adults learn best when they are being interactive." Those who feel strongly that the answer is yes stand on one side of the room, those who feel no stand on the other and everyone else stands somewhere in-between. You can then ask the participants to share their thoughts and why they are standing where they are.

Benefits

- gets the participants moving – good for when their attention starts to drift away
- good for kinesthetic learners
- demonstrates the range of thoughts and opinions

Challenges

- need a bit of space to be able to do this
- must ensure that no participants feel judged for their opinions

Student Reading

Often times there is material that needs to be simply presented to the participants. To involve them a bit more in this process you can have the participants read different sections or paragraphs out loud to the rest of the group. You can go in order around the room and have everyone read, or you can ask for volunteers. If you only ever ask for volunteers be aware that this will encourage the more outgoing participants to be more out going and the quiet/reserved participants to be more quiet and reserved.

Benefits

- good for auditory learners
- when everyone reads it is a way of getting quiet or withdrawn participants to participate
- when you ask for volunteers it is a way of allowing an opportunity for the more outgoing participants to engage more

Challenges

- you must be able to correct pronunciation errors in a positive and supportive way
- some participants will be very uncomfortable with this activity

Handouts

If you are planning to give handouts to your participants, leave strategic blank spaces in the information so that they need to pay attention.

Benefits

- encourages participants to stay focused so that they don't miss the information to fill in the blanks
- good for kinesthetic learners

Challenges

- takes time to prepare the handouts
- participants can be disruptive if they miss an answer and are asking their classmates what it was

Sequence and Sorting

Information that needs to be put into a sequence, or needs to be sorted, is placed on index cards. The class is divided into smaller groups and each group is given a set of the cards and they have to put them in the right sequence or sort them correctly.

Benefits

- encourages participants to work together
- creates dialog
- changing the groups around allows participants to interact with other even more participants

Challenges

- takes time to prepare the index cards

Role Playing

Scenarios that are related to the topic at hand are created in advance. Participants are paired up or placed in small groups and given a scenario. Using the information they have learned they act out the scenario. Usually you would give the groups a little bit of time to prepare their role play and then they present it back to the whole group.

Benefits

- good for visual, auditory and kinesthetic learners
- allows participants to actively use the information they have learned
- encourages dialogue among the participants

Challenges

- takes time to create the scenarios
- takes time to act out the scenarios
- not all participants will be comfortable acting in front of a group

Two minute paper (Grasha, 1998)

During class, participants are given two minutes to write a short paper on topics such as:

- their opinion on a certain issue/topic
- something they liked/disliked about a classroom activity
- new insights that they have had
- how the information they have learned will impact their everyday lives

Benefits

- allows independent study
- gives you insight into how the session is going

Challenges - none

Projects
If you are teaching a multi-session course you also have the ability to have the participants complete a project over the length of the course. In the first session you can introduce the project, the expectations etc., and then each week they can continue to work on it as they learn more information. For example:

- At the end of this course you will have to submit a 30 minute presentation (including lesson plans) for a topic of your choice as it relates to facilitating training for older adults.

Benefits
- participants direct some of their own learning
- allows for creativity and experimentation

Challenges
- participants are busy people. You will need to ensure the project will not take up an unrealistic amount of time outside of the sessions

Debate – with a Twist (Grasha, 1998)
Participants are given a topic and asked to develop 2-3 main points for and against a topic. The class is divided into 2 teams, one for and one against (more teams can be created if it is a large class). One side presents their points and then the other side is allowed to ask questions. Then the teams switch roles and do it all over again. When both sides are finished, the participants write down 3-4 things that they learned from the other side and any outstanding questions that they have. The class comes back together and participants are invited to share what they have learned or what questions remain.

Benefits
- participants are exposed to a variety of viewpoints
- opportunity to think critically

Challenges
- getting the participants organized into the activity
- ensuring they stay on task

Learning Pairs (Grasha, 1998)
Participants are put into pairs and assigned a topic. For a certain amount of time (e.g. 15 minutes) they are to ask each other questions as they relate to the topic (questions can be asked directly from the manual, from handouts etc.)

Benefits

- good exercise for engaging shy or quiet students
- participants get to create their own questions

Challenges

- students may struggle with coming up with challenging questions

Concept Maps
Students are placed into small groups and asked to create a diagram that organizes and shows information for a particular topic.

Benefits

- good for visual and kinesthetic learners
- gets participants working with the information in a completely different way

Challenges

- participants may struggle with figuring out how to organize information into a diagram

What Questions Do You Have?
Participants are put into small groups. Each group writes down questions on recipe cards – one question per recipe card. One person from each group takes those questions to another group which will in-turn answer the questions The person who brought over the question cards, records the answers to the questions, then returns to their original team members to share the written responses.

Learning Circles

Place all the chairs in one large circle. Ask the group a question and ask for one participant who would like to respond first. Then continue around the circle until everyone has responded. Each person has 30 seconds to share their answer and no comments are allowed from other participants during that time.

Benefits

- allows each participant time to give their own answer without comments from anyone else
- exposes participants to other ideas and opinions
- participants may actually listen more intently as they do not have to think of a quick response, due to the no comments rule

Challenges

- some participants may feel like they are on the spot
- it may be frustrating at first for individuals who like to comment

Open Book game

Participants are put into groups of 5-6 and are given cards that have questions on them relating to a certain topic (s). One person picks up a card and rolls the dice to see how many points the question is worth, the person to their right has to answer the question, and if they answer correctly they get the points (the rest of the group can flip through the session material to confirm if they got the right answer). After the activity is over, open up the game to the whole class to see if there are any outstanding questions.

Benefits

- quizzes participants on what they know
- gets the whole group to use the session materials (as they flip through looking for right answers)

Challenges

- if the questions are too hard the participants will get frustrated. The goal of this activity is not to give an exam but rather to get the participants to assess their own level of knowledge.

Think-Pair-Share

Participants are given a topic and asked to write down their own thoughts and perspectives. They then partner with someone else and each shares their thoughts on the topic. That pair then joins another pair and all four people share their perspectives. You can have the activity end at that point or have one person from each group of four share their discussion points with the whole class.

Benefits

- participants have the opportunity to reflect on their own thoughts and opinions
- good for those who are reluctant to participant in large group discussions
- exposes the participants to multiple perspectives

Challenges

- time required (20-25 minutes)

Spend a Penny (Renner, 2002)
Each participant is given three pennies or tokens. Each time they speak up in the class it costs them a penny. When all three pennies are gone they must remain silent for the rest of the class.

Benefits

- helps to equalize class participation
- participants learn to choose when it is important to speak up -- to use their pennies wisely

Challenges

- individuals who like to speak up a lot may feel a bit constrained

Appendix C

Ice Breakers and Energizers

Facilitator Hot Seat

Put participants in small groups (maximum five per group). Groups are given one minute to do quick introductions amongst themselves and then five minutes to come up with a list of questions they want to ask about you or the course. Now, put yourself in the hot seat and have each group ask one question each until all of the questions have been answered.

Let’s Start a Business!

Put participants into small groups (3-5 people). Each group is given some supplies (this can be anything – masking tape, pipe cleaners, paper, tooth picks etc.) and they are tasked with:

- Creating a new product/invention with the supplies they have
- Creating a business name and slogan

Give the groups 10-15 minutes and then ask each one to present their idea back to the rest of the participants. This is a good opportunity for the participants to work together on something fun where there is nothing to lose.

Two Truths and a Lie

Each participant is asked to share 3 things about themselves, two of which are true and one of which is a lie. The rest of the group guesses which statement was the lie. This is a great way for people to share things about themselves that otherwise may not come up in conversation.

Quotations

In groups of 3-5 participants are given a piece of paper with a quote on it. The quote should be related to the topics that you will be discussing. The group is given 10 minutes to discuss how the quote relates to the topic at hand. Then each group presents their discussion points back to the rest of the participants.

Burning Questions

Participants are given several sticky notes and are asked to write down any burning questions that they may have-- what they want to learn or what they want to experience by the end of the session. They then place their sticky notes on a flip chart at the font of the room and the facilitator goes through them all. This gives the facilitator insight into what the participants are looking for and also allows time to inform the participants if any of their questions/requests fall outside the scope of the course. Some students will struggle with this exercise as they haven’t given much thought to why they are there. When that happens try asking them this question:

What do you need to learn or experience by the end of this session for you to walk away thinking that it was worth your time and money to be here?

Introducing My Partner

Participants partner up and ask each other a series of questions (name, occupation, hobbies etc.) and then they introduce their partner to the rest of the group highlighting some of the information from their conversation.

Toilet Paper

Pass a roll of toilet paper around the room instructing participants to take some and pass it along. Inevitably some will ask how much they should take – simply tell them to take as much as they want to. Once everyone has their piece of toilet paper, tell them that they need to share with the group one piece of information about themselves for each square of toilet paper that they are holding.

Appendix D

The Facilitator's Toolbox

The Facilitator's Toolbox

Having your own facilitator's toolbox is an easy way to ensure that you have all the tools you need for your course. Your toolbox may contain items for your own use or items that your participants may need. For example:

- pens
- pencils
- whiteboard and flipchart markers
- painter's tape for posting flip chart paper
- overhead pens
- laser pointer
- stapler
- hole punch
- printed course materials

You can also add an element of fun to your course by having a participant tool box on each table. This box could have pens, pencils, highlighters, sticky notes, candy and any other fun things that you think the participants may enjoy. If you are teaching a multiple session course it is important to clean up the toolboxes before each session and restock them.

Appendix E

Resources

Websites

www.businessballs.com
Free career help, business training, organizational development - inspirational, innovative ideas, materials, exercises, tools, templates.

www.mindtools.com
Free information and resources to help develop skills and techniques that help you excel in your career (leadership, personal effectiveness, goal setting, and stress management, etc.).

Wuzzles - www.wuzzlesandpuzzles.com/wuzzles
A wuzzle is a saying/phrase that is made up of a display of words, in an interesting way. The object is to try to figure out the well-known saying, person, place, or thing that each wuzzle is meant to represent. These are quick and easy mind teasers that can be used at any point in your presentation to add in some fun and mental challenge.

www.icebreakers.ws
Lots of free ice breakers, energizers and other activities that you can use in your courses and workshops.

www.group-games.com/games-by-type
Another free resource for ice breakers and group games.

Microsoft online - http://office.microsoft.com
Free template and tutorials to help create impactful presentations.

http://stephenbrookfield.com
Website of Dr. Stephen Brookfield, University Professor, University of St. Thomas Minneapolis, Minnesota. Lots of different adult learning resources and facilitation ideas.

BC Provincial Instructor Diploma Program
www.instructordiploma.com/webpages/content.cfm?contentID=5
The Provincial Instructor Diploma Program provides new instructors with the competencies needed to design, manage and evaluate the instruction of adults in post-secondary education, business, industry and non-traditional adult learning environments.

Books

The Big Book of Flip Charts (Robert Lucas, 2000)
This book covers everything from how to draw great looking flip charts to how to facilitate with them.
ISBN #0-07-134311-3

The Trainer in You (Hugh Phillips, 2004)
Information on designing and delivering courses and workshops.
ISBN #0-9736020-0-2

The Courage To Teach: Exploring the Inner Landscape of a Teacher's Life
(Parker J. Palmer, 2007)
“For teachers who refuse to harden their hearts, because they love learners, learning, and the teaching life." — Parker J. Palmer [from the Introduction]
ISBN # 0787996866

The Art of Teaching Adults: How to Become an Exceptional Instructor & Facilitator
(Peter Renner)
Available from www.peter-renner.com

The Skillful Teacher (Stephen Brookfield, 2006)
In this second edition of the book that has become a classic in the field, award-winning author Stephen D. Brookfield offers inspiration and down-to-earth advice to new and seasoned teachers. The Skillful Teacher is a comprehensive guide that shows how to thrive on the unpredictability and diversity of classroom life and includes insights developed from the hundreds of workshops conducted by the author.
ISBN # 0787980668

Appendix F

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