

Facilitation 101

How to Lead a Class

A Resource for Volunteers
Facilitating Adult Classes

faith 
FORWARD
from Visitor to Leader



First Unitarian Church of Dallas
be the way...

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To facilitate = to make easy

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Facilitation 101

Class Overview

Levels of Professional Facilitation

	Level I Training and Meetings	Level II Complex Decisions	Level III Organizational Change
Roles and Responsibilities	Plan class or meeting Facilitate class or meeting Guide discussions Ensure agenda followed Facilitate achieving purpose	Design complex decision-making processes Manage challenging situations Resolve conflicts Facilitate achieving decisions	Design organizational change initiatives Guide teams in planning and executing change initiatives Facilitate achieving decisions and taking action
Examples	Business training class or team meeting	Strategic planning meeting to prioritize use of \$20 million in new products	Senior leaders planning and executing a major shift in customer relationship management
Skills	Meeting Facilitation Instructional Design Problem Solving	Team Management Decision Making Conflict Resolution	Change Management Strategic Thinking Project Management

Class Contents

Facilitating Adult Education Classes	
Class Management	Facilitation Skills
Instructional Design to Enhance Learning	Being an Effective Facilitator
Utilizing Church Resources	The Art of Positive Intervention
Managing a Successful Class	Close Class

Facilitation 101

Role of the Facilitator

When Are You Facilitating and When Are You Teaching?

Activity	Facilitating	Teaching
Introduces newcomers		
Clarifies purpose of the meeting		
Clarifies expected meeting behaviors		
Explains subject matter material		
Keeps discussions focused		
Answers participant subject matter questions		
Ensures participation by all group members		
Paraphrases participants' comments		
Asks challenging questions		
Helps achieve the purpose of the meeting		
Manages meeting time		
Follows the meeting agenda		
Resolves conflicts		
Achieves group consensus		
Intervenes with difficult situations		
Closes the session		

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Stakeholder Expectations

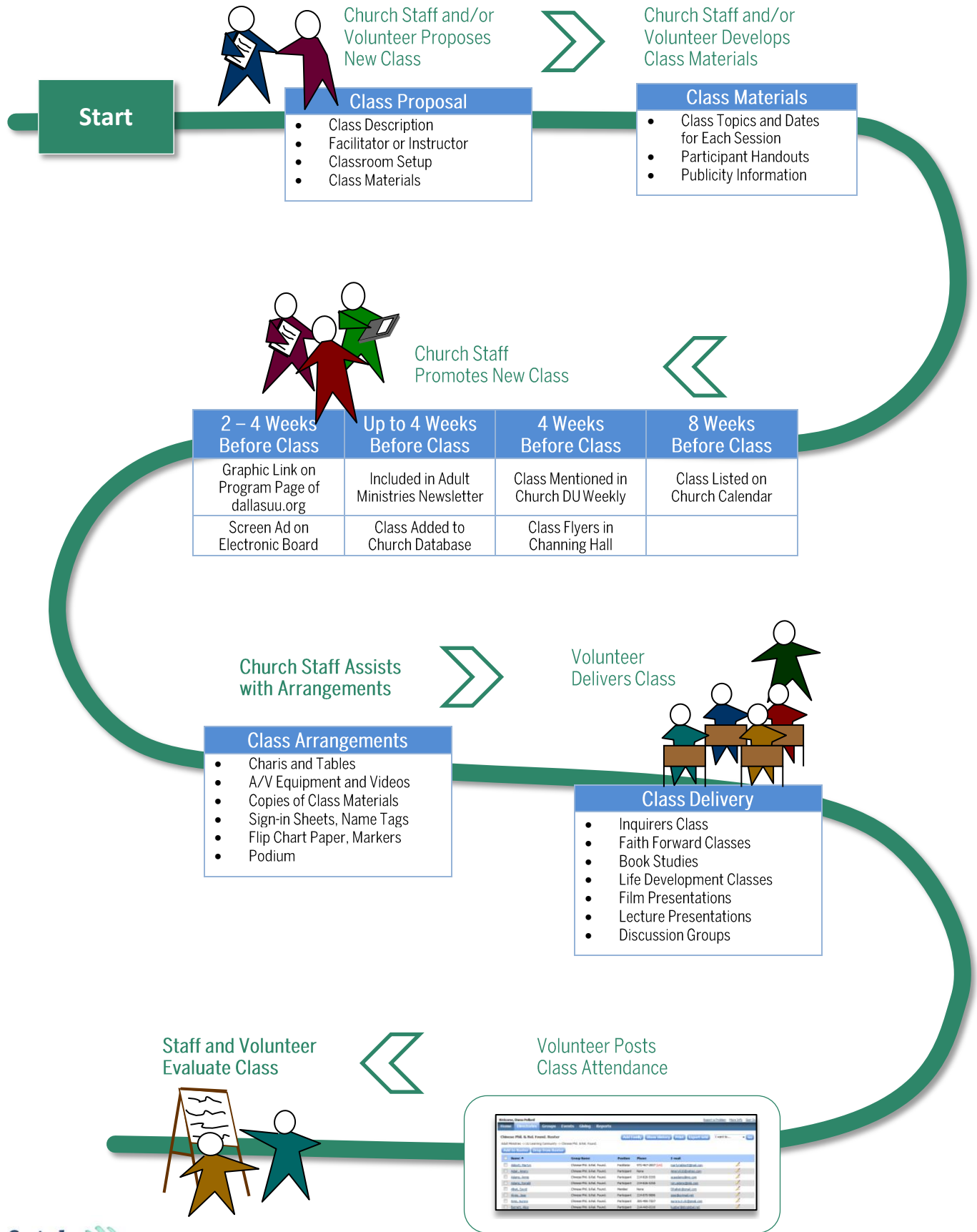
Class Participants (Members and Visitors)

Church Staff

Class Facilitator or Teacher

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Utilizing Church Resources



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Instructional Design to Enhance Learning

Adult Learning Concepts

Malcolm Knowles (1913 – 1997)

- 1. Effective adult learning encourages collaboration**
Adult learners thrive by interacting and collaborating with their educators and their fellow learners to plan, participate in and evaluate their instruction.
- 2. Effective adult learning is self-directed**
Adult learners are more engaged in the learning process when that they can understand the goals and structure of instruction and can make informed choices about their own learning objectives.
- 3. Effective adult learning utilizes past knowledge and life experiences**
Adult learners grasp concepts most easily by connecting their past knowledge and experience to new information and ideas.
- 4. Effective adult learning is relevant**
Adults learners are most interested in learning subject matter that has immediate relevance and impact to their work and/or personal life.
- 5. Effective adult learning offers practical solutions**
Adult learning is facilitated by providing practical methods for implementing theoretical knowledge in real life situations.
- 6. Effective adult learning provides multiple modes of learning.** Adult learners typically use three learning modes: auditory, visual and kinesthetic. Most people use all three modes at one time or another.

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Instructional Design to Enhance Learning

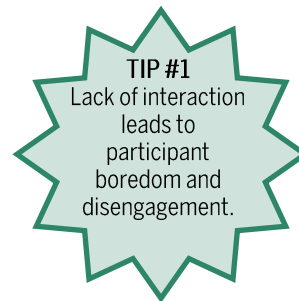
Adult Learning Concepts

- Effective adult learning encourages collaboration
 - Effective adult learning is self-directed
 - Effective adult learning offers multiple modes of instruction
-

Adult Learning Tools and Techniques

Opportunities for Participant Interaction

- Question/answer sessions
- General discussion
- Breakout activities/ group report-outs
- 1-2-3: Individual work, dyad, triad
- Focused discussion: fill-in the blank, compare/contrast
- Role playing: Talk circuits
- Storyboarding
- Games
- Jigsaw learning
- Videos to explain concepts



Words of wisdom . . .

I hear and I forget.

I see and I remember.

I do and I understand.

Chinese Proverb

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Instructional Design to Enhance Learning

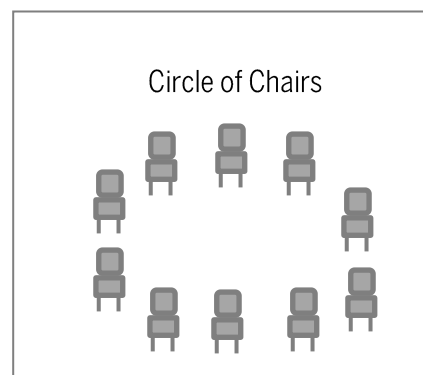
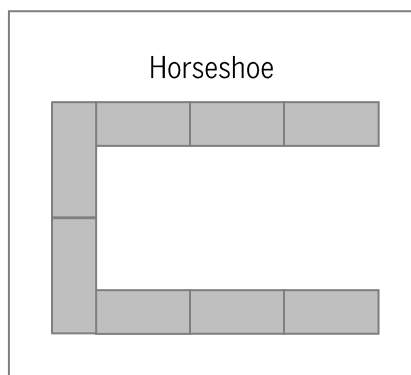
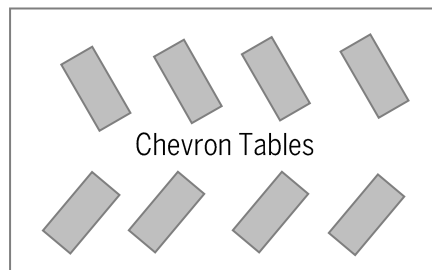
Adult Learning Tools and Techniques

Allocate Time for Learning Activities

- Maximum of 10 to 15 minutes per learning segment
- Minimize lecture time and maximize participant activities
- Include participant learning activities at least every 15 minutes

Set up the Classroom to Encourage Participation

- Theater-style seating discourages participant interaction. People assume they'll just be lectured to
- Promote collaboration among participants with small group seating
- Allow space for the facilitator/teacher to be in foreground or back ground as appropriate



Facilitation 101

Managing a Successful Class

Adult Learning Concepts

- Effective adult learning encourages collaboration
 - Effective adult learning is self-directed
-

Welcoming Participants

Class participants may or may not be acquainted with each other before this class. Even if they are, an ice breaker is a good way to create a more relaxed atmosphere and help the participants feel more comfortable with each other. This is important to the success of any class that uses collaborative learning activities where the participants must work together. This is also an opportunity for the facilitator to learn more about the participants and their expectations.

An ice breaker can be as simple as asking each person to introduce themselves and relate some pertinent piece of information about themselves. It can be as elaborate as a game that requires participants to mix and mingle before class begins. Whenever possible, create an ice breaker that provides you information that is relevant to the content of the class. For example, ask people to relate their past experience with the class topic or what questions or concerns they have.

Class Startup

Many UUs enjoy a certain amount of ritual. If appropriate for your class, begin each session with lighting a chalice, ringing a bell, or other ritual that signals that the class is to begin.

The class agenda or outline sets the stage for the entire meeting. It manages expectations about the purpose and content of the class. It helps participants understand the structure of the class so that they can make informed choices about their own learning objectives.

- Write the class outline on a flip chart or have it available in a class handout.
- You do not need to explain the entire outline in detail, just the major topics to be covered.
- Explain the overall contents from the participants point of view, for example, “In this section you’ll learn about . . .”.
- Explain the overall structure of the class, for example, “We’ll start with . . ., then move on to . . .”.
- If appropriate, refer to information from the ice breaker in explaining the agenda.
- Explain when (or if) breaks will occur.



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Managing a Successful Class

Class Covenant

Participants like to know what to expect from an facilitator, as well as what is expected from they themselves. A class covenant is simply an agreement between you, the facilitator, and the class participants about the nature of the class and your expectations about participant behavior. Typical covenants address:

- **Your role as facilitator**

Introduce your self and explain your role.

- My job today is to be your instructor in exploring and learning about . . .
- My job today is to be your facilitator as we discuss our book . . .
- My job today is to keep us on track and make sure everyone has a chance to participate.
- My job today is to help you learn and practice concepts and ideas about . . .

- **Class management**

Explain the rules about time management.

- We'll start and end on time.
- Please be respectful of our time together as we have a full agenda.
- The parking lot is for side issues that we don't have time to discuss in class.

- **Participant behavior**

Explain how participants can contribute to a successful class.

- Share the airtime
- One speaker at a time
- Speak from your own point of view
- Respect others' thinking, ideas, beliefs
- Manage your own input – no long speeches



Facilitation 101

Managing a Successful Class

Managing the Pace of the Class

Part of your job as facilitator is to manage the pace of the class to ensure that the agenda is followed and that all of the materials are covered. Here are some techniques to help you manage class time:

- **Create a streamlined agenda.** The agenda defines the structure of the class.
 - Allow time for discussion and participant activities in the agenda.
 - Review the agenda at the start of class so everyone knows the expected time frames.
- **Manage the time for each section.** Knowing that you have run out of time at the end of the class leaves you no options.
 - Have a wall clock easily visible to you.
 - If you use a timekeeper, ask this person to let you know 5 minutes before the end of each section.
 - While a timekeeper is helpful, always watch the time yourself.
- **Manage class activities.** Part of your job is to ensure participants get maximum benefit from interactive learning.
 - Provide structure by forming groups and presenting background information on the topic.
 - Explain the linkage between the activity and the topic at hand.
 - Provide clear instructions so that participants can complete the activity successfully.
 - Make sure the groups stay on task throughout the activity.
- **If the class is running behind, take action.** You have several options to resolve the situation.
 - Ask participants to limit their comments to 1 or 2 minutes.
 - Change instructional strategies to save time – rather than have break-out groups, lead a general discussion of the material.
 - Skip items – ask participants to decide which items to skip.
 - Defer items to the next class meeting – again ask participants which items to defer.



Facilitation 101

Being an Effective Facilitator

Adult Learning Concepts

- Effective adult learning encourages collaboration
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 - Effective adult learning is offers multiple modes of learning
-

Facilitator Behavior

- Speak from your own point of view.
- Take the time to reflect before responding to challenging behavior.
- Listen and question responsively.
- Make eye contact.
- Make the participants the center of attention.
- Stay present in the moment.
- Encourage everyone to express their views.



Projecting Confidence

“Your Body Language Shapes Who You” Are by Amy Cuddy.

Global Scanning









Effective facilitators maintain awareness of the classroom at all times. The technique, called global scanning, is similar to what you do when driving a car. You continually scan the traffic around you, looking for possible risks, accessing the intentions of other drivers.

Global scanning of the classroom is wide-angle scanning of the environment. As the facilitator, you want to know who is participating and who is not, who is engaged in side conversations, who has a question, who is bored. This continual scanning helps you be aware of these situations so you can take the appropriate action. Learning to read body language can give you clues about participant’s state of mind and which actions would best encourage participation in the class.

Facilitation 101

Being an Effective Facilitator

Reading Body Language

This Body Gesture . . .	Typically Means . . .
 <p data-bbox="542 449 699 485">Good posture</p>	<p data-bbox="927 449 1198 485">Confidence, composure</p>
 <p data-bbox="542 617 699 653">Relaxed arms</p>	<p data-bbox="927 617 1166 653">Non-defensive, open</p>
<p data-bbox="542 737 829 772">Hands behind one's head</p>	<p data-bbox="927 737 1187 772">Superiority, arrogance</p>
 <p data-bbox="542 869 792 905">Scratching one's chin</p>	<p data-bbox="927 869 1040 905">Suspicion</p>
 <p data-bbox="542 1052 813 1087">Propping up one's head</p>	<p data-bbox="927 1052 1036 1087">Boredom</p>
 <p data-bbox="542 1220 662 1255">Slouching</p>	<p data-bbox="927 1220 1105 1255">Low confidence</p>
 <p data-bbox="542 1388 704 1423">Crossed arms</p>	<p data-bbox="927 1388 1127 1423">Defensive, closed</p>
 <p data-bbox="542 1556 797 1591">Scratching one's head</p>	<p data-bbox="927 1556 1143 1591">Doubt, uncertainty</p>
 <p data-bbox="542 1724 764 1759">Stroking one's chin</p>	<p data-bbox="927 1724 1175 1759">Judgment, dismissive</p>

Facilitation 101

Being an Effective Facilitator

Responsive Listening and Questioning

Types of Questions	Examples
Encouraging participation	That's an interesting point. Tell us about . . . ? That's a good observation. How do you link it to . . . ? The author (or video) states . . . , do you agree? What questions do you have about . . . ?
Summarizing a comment	Are you saying . . . ? What I'm hearing is . . . Is that correct?
Inviting a deeper response	Can you say more? What else is connected to this? Think back to . . . and describe . . . What if . . . what would be the consequences?
Inviting divergence	What is the opposite of this? Who sees this in a different light? Who has experienced this differently?
Reframing a comment	Can you say that another way? What if your context were different?
Challenging a comment	Can you explain why you think that? What would be the opposite of that? Does anyone else have a different point of view?

Words of wisdom . . .
"I never know what I said until I hear the response"
Norbert Weiner

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The Art of Positive Intervention

Adult Learning Concepts

- Effective adult learning encourages collaboration
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Types of Conflicts


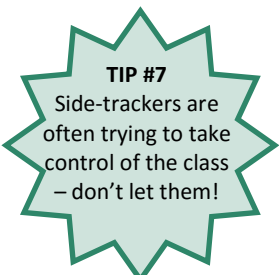
Types of Conflict	Examples	Types of Intervention
Situational The parties are in conflict over an issue or problem	Two teams are competing for the same resources to complete high-profile projects.	Resolve using problem-solving or decision-making approaches that promote win-win solutions.
Behavioral An individual is engaging in ineffective behaviors	A person exhibits behavior detrimental to the group: side-chatting, being rude, dominating the discussion.	Resolve by redirecting the person to more effective behavior. Resolve by deflecting the person from the detrimental behavior.
Philosophical The parties are operating out of deeply held, conflicting beliefs	Two or more parties clash over core beliefs that are incompatible: Atheist vs. Fundamentalist beliefs and practices.	Very difficult to resolve. Promote understanding of each other's views without forcing agreement on either side.
Emotional An individual is acting out his or her emotional state	The passive-aggressive person who slyly makes mean comments about others.	These individuals need the help of a qualified professional. Quick interventions typically do not work.

Words of wisdom . . .
When two people are far apart,
the goal is not to force them to a common ground,
but to fill the space between them with understanding.

Facilitation 101

The Art of Positive Intervention



Dealing with Behavioral Conflicts: Redirection

Type of Behavioral Conflict	Before-Hand Intervention	Real-time Intervention	After-the-Fact Intervention
Over Talkers 	Establish a clear meeting agenda with expected times for each item. Establish a meeting covenant that addresses sharing the air time and limiting speech time.	[Name], I'm going to stop you right there. <ul style="list-style-type: none"> • That is an interesting point. What does everyone else think? • We've got to move on to cover other topics. • I want to hear from some other people. 	[Name], I noticed that you had a lot to say today. <ul style="list-style-type: none"> • Help me keep the class on track by limiting your remarks to two minutes or so. • Help me to get the more timid people involved by limiting your remarks.
Under Talkers	Design activities so that people talk with a partner before giving answers in a large group. Design activities with small group breakouts to give everyone a chance to talk.	[Name], what questions do you have about this topic? [Name], Do you agree with what . . . just said? [Name], what has been your experience with . . . ?	[Name], I noticed that you were very quiet today. You have such insightful ideas, I'd like to hear more of them.
Side-Chatters	Design activities with structured chats: break-out groups, talking with a partner, etc.	A simple, quiet, "hush" is often sufficient. [Name] and [Name], please rejoin us, I want your input on this topic.	[Name] and [Name] I noticed today that you had a lot to talk about with each other. Help me keep the class on track by toning it down in the future.
Side-Trackers 	Instruct the class in the use of a parking lot to record side-issues. Include limiting side-issues as part of the meeting covenant.	Record the issue on the parking lot and move on with the class. If the issue is relevant to the class, allow a brief discussion, but limit the impact on class time. [Name], while that's an interesting issue, it's not on target for today's topic.	Decide what, if any, action to take about side-issues recorded on the parking lot.

Facilitation 101

The Art of Positive Intervention

Dealing with Behavioral Conflicts: Deflection

Type of Behavioral Conflict	Before-Hand Intervention	Real-time Intervention	After-the-Fact Intervention
Sarcasm 	Establish a meeting covenant that addresses respect for both people and their ideas.	[Name], while your comment is a good one, the sarcasm was unnecessary. Please say it again in a more neutral way.	[Name], I noticed that you failed to think before your spoke today. Your comment was very hurtful to {Name}. Let's try to avoid sarcasm in the future.
Cynicism (Negativity)	Establish a meeting covenant that addresses respect for both people and their ideas.	[Name], your comment sounds so negative! Let's stay more positive for the rest for this class.	[Name], I noticed that you were very negative today. I need you to participate with a more open mind in the future. Tell me, what's going on?
Challenge to Authority 	Establish a clear meeting agenda and covenant.	[Name] I hear what you are saying . . . However, this is our agenda and we're staying with it. When we evaluate this class, we'll record your ideas.	[Name], we've put a lot of time and effort into designing this class. If it doesn't meet your needs, please give me your ideas, but not during class time.
Interruptions	Establish a meeting covenant that addresses sharing air time and only one person talking at a time.	[Name], someone else was talking. We'll get to you in a minute.	[Name], I need you to respect our agreements to share airtime and only one person talk at a time.

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