

Introduction to Facilitation Skills



Facilitator's Guide

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Orientation to the Facilitator's Guide

Note to Facilitator

Read this section to familiarize yourself with the program goals, the materials, and how to prepare yourself to conduct the training session.

This is an **interactive training session** that will require you, the **Facilitator**, to **model** the skills required to successfully conduct a training session and will require **Participants** to **observe** and **participate**. By taking part in this session, participants will develop and strengthen the skills necessary to effectively facilitate training.

This orientation segment of the guide provides an overview of the training and how it will be conducted, as well as some suggestions for ways in which you may use this guide as you conduct the training.

Program Goals

The primary goal of this program is to teach participants:

- The concepts essential to adult learning and how best to maximize the adult learning experience
- Preparation techniques to minimize prep time and ensure successful facilitation
- Ways to manage a group of adult learners and adjust a session to meet the needs of the participants
- Tips, tricks, and techniques that will optimize the learning experience

A secondary goal is to introduce the participants to resources available to assist them with their future needs.

Who is the Audience?

- New trainers for the Performance Improvement and Training department.

Also, be aware that:

- Participants are primarily those who did not attend Bob Pike seminar at the Fall 2003 offsite.
- The optimal number of participants for each session is 8-10 people per class.

How Will the Training Be Conducted?

The training is designed to be conducted as a 1½ day classroom session that includes:

- **Pre-work** that participants will do prior to the class
- **Participation** during the class, in which participants will work independently and in assigned break-out groups
- Some **Follow-Up activities** after the class at the request of the RTM

How to Use the Facilitator's Guide

As you use this Facilitator's Guide to conduct the session, take note of the following symbols and their meanings. These symbols will be used throughout the guide to provide direction as you facilitate the training.



Conduct a class discussion.



Conduct an activity.



Conduct a toolkit activity.



Tell participants to take notes or write information in their Participant's Workbooks.



Capture information on a flipchart.



Track the time.



Work in assigned break-out groups.



Power Tip: Share this power tip, or ask for a volunteer to read the power tip from the Participant's Workbook.



Ask participants to make a personal reflection.

How to Use Participant Materials

Provide each participant with a Participant's Workbook they can use to reinforce concepts as session is delivered. The Participant's Workbook has lots of note-taking space and places for participants to capture key points and ideas that are generated during session. Periodically verify the location in the workbook to ensure participants are in the right place to follow along.

One of the key features of this training event is the participant ownership through the development of their own facilitation toolkit. Instructions to facilitate this process and tools for participants are found within these materials.

Using the Pre-work for the Session Starter

In advance, all participants will be assigned a pre-session activity (pre-work) that you will use as part of the Session Starter.

- Before attending this session, participants will observe a training session and complete the *Facilitation Observation Checklist*. They are instructed to list the techniques they observed to be effective and ineffective during the session, as well as the things they felt made the learning memorable and helped them learn. Participants are asked to be prepared to share their ideas about the session they observed with other participants during this training session.
- *Note: This form may be distributed by the facilitators. In the future, this form and other prework will be available through LMS.*
- Participants will also be asked in the pre-work to think about an area of development in which they would like to improve when facilitating and be prepared to share with other participants.

Preparing to Facilitate the Session

To prepare yourself before the session, do the following:

- Familiarize yourself with the materials contained in this Facilitator's Guide.
- Familiarize yourself with the Participant materials.
- Practice with another facilitator and ask for feedback.
- Complete the Learning Style Inventory for yourself.
- Review the Bob Pike materials from the Fall 2003 Offsite, if available.
- Read and be articulate about the concepts found in *The Accelerated Learning Fieldbook* by Lou Russell, copyright 1999 by Jossey-Bass/Pfeiffer.

The Accelerated Learning Fieldbook by Lou Russell, copyright 1999 by Jossey-Bass/Pfeiffer was referenced in the development of this training material.

How to Deliver Successful Learning

Note to Facilitator

The purpose of this segment of the training is to identify how people learn and the role a facilitator/trainer plays in this process.

Track the Time



This segment requires 60 minutes.

Transition

- Say or paraphrase: Now that we know our program goals and have a few concepts about the important role of the training facilitator, let's focus on understanding how people learn.

Introduce what will be discussed in this segment

What To Do

- Introduce the following topics that will be covered in this segment of the training.
 - Identifying various intake styles and understanding the role of facilitator to tap into them
 - Identifying multiple intelligences and their roles in learning
 - Understanding whole brain theories
 - Describing the role of the facilitator in the development of memory and retention
- Write on a flipchart:
 - Adult Learning
 - Intake Styles
 - Multiple intelligences
 - Whole brain theories
 - Role of Facilitator

Refer participants to Workbook page ____



Introduce the Topic: Overview of Adult Learning

What To Do

- Say or paraphrase: Adult learners have special characteristics that must be taken into consideration when facilitating a class or training session. By understanding and addressing these special needs and requirements, you will help your participants learn more and enjoy the experience more, and you will be more effective as a facilitator.

Introduce the Topic: Characteristics of Adult Learners

Refer participants to
Workbook page ____



Conduct a Group Discussion



What To Do

- Say or paraphrase: To begin, let's take a look at the basic characteristics of adult learners.
- Ask for volunteers to read each of the characteristics listed in their workbooks.
 1. Adults are self-directed. Adults need to be free to direct themselves.
 2. Adults have life experiences and knowledge, including previous education, work-related experience, and family responsibilities. Adults need to connect the learning to this knowledge and experience base.
 3. Adults are goal-oriented. Adults need to view the learning as a way to achieve their goals. Adults need to see how the learning is relevant to their goals and their needs.
 4. Adults are practical and may not be interested in knowledge for its own sake. Adults need to know how they will be able to apply the learning.
 5. Adults need to feel respected.

Power Tip: Periodically review or tie in ideas or topics that were previously discussed. This will reinforce, as well as provide relevant context, for the information you are presenting.

What To Do

Conduct a class discussion by asking:

- What are some ways in which a good facilitator can address each of the characteristics of adult learners?
- How can facilitators tailor their classroom experiences to incorporate these methods?
- Listen for these answers:

1. **Adults are self-directed. Adults need to be free to direct themselves.**

Facilitators:

- Actively involve adult participants in the learning process.
- Allow the participants to assume responsibility for presentations and group leadership.
- Guide participants to their own knowledge instead of supplying them with facts.

2. Adults have life experiences and knowledge, including previous education, work-related experience, and family responsibilities. Adults need to connect the learning to their knowledge and experiences.

Facilitators:

- Ask participants to share their experiences and knowledge.
- Make connections from the information to the participants' experiences.

3. Adults are goal-oriented. Adults need to view the learning as a way to achieve their goals. Adults need to see how the learning is relevant to their goals and their needs.

Facilitators:

- Uncover the goals of the participants.
- Demonstrate to participants that learning the information is a way to achieve the goals.
- Show participants how the class will help them reach their goals.
- Provide a link from the information to provide present, as well as future, relevance to participants.
- Present the information in a setting that is familiar to the participants.

4. Adults are practical and may not be interested in knowledge for its own sake. Adults need to know how they will be able to apply the learning.

Facilitators:

- Let participants know how the information is useful to them, or how it can be used.

5. Adults need to feel respected.

Facilitators:

- Always treat participants as equals.
- Let participants make choices and voice their opinions.

**Introduce the Topic:
Barriers to Adult
Learning**

What To Do

- Say or paraphrase: There are some barriers to learning that may occur when you are working with adult learners. Being able to identify these barriers will make it easier for you to formulate ways to avoid or overcome them.

Conduct a Group Discussion



Refer participants to Workbook page ____



Introduce the Topic: What Motivates Adults to Learn?

Ask for Personal Reflection



Refer participants to Workbook page ____



Conduct a Group Discussion



What To Do

Conduct a class discussion by asking:

- Can you think of some barriers that may occur when you are working with adults?
- Listen for these answers:
 - Overscheduled/Distracted
 - Lack of confidence
 - Lack of information about learning opportunities
 - Lack of interest
 - Problems with child care
- How can we decrease these barriers?

What To Do

- Say or paraphrase: When you facilitate a learning session, you need to decrease the barriers and increase the motivation for adult learners. To do this, you must also understand what motivates adult learners.

What To Do

- Ask participants to take three minutes to think back on reasons they have been motivated to learn, and be prepared to share these with the class. At the end of the reflection time, ask volunteers to share their ideas.

- Say or paraphrase: Let's take a look at some ways to increase an adult learner's motivation and discuss what each of these mean.

What To Do

Conduct a class discussion by asking:

- What are some ways you can motivate the participants?

Refer participants to
Workbook page _____



- **Direct the discussion to make sure these key points are covered. Ask participants to provide examples of how they would accomplish each of these.**

1. Create a need for the participants to know the information.

- “What’s in it for me?” is the question that is often on the adult learner’s mind, making it very important to emphasize, “what is in it for them” at the start of every presentation.
- As you present information, take the role of the learner to answer these questions as you conduct the session:
 - Why is this information important to me?
 - How will this information benefit me?
 - In a practical environment, how can I make use of the information?

2. Find ways to increase the participants’ own self-motivation.

- At the beginning of the session, ask participants to share their expectations for the class, and ask them how they can achieve the results.
- Give participants responsibility for some of the group tasks, such as time keeping, returning from breaks, selecting activities.
- Provide handouts with blanks for some of the information, requiring the participants to take notes and record ideas for the materials to be meaningful. Use incomplete handouts or partial outlines to facilitate structured note-taking.

3. Capture and sustain the participants’ interest level.

- Ask questions.
- Use incomplete handouts or partial outlines.
- Use varied presentation techniques and mediums (brainstorming, skill practice, independent activity, group discussion, etc.).
- Include activities and games.
- Use visuals, such as flipcharts, overheads, video, etc.

4. Emphasize the practical application of the information.

- Map the information to participants’ job duties.
- Ask participants to share how they will put the newly learned information or skill to use.

- 5. Acknowledge and encourage the participants' input.**
 - Let participants know that you appreciate their attention and interaction.
 - If a participant has a conversation with you at break time about a point you made during class, start the session by recognizing the participant's comment or observation and sharing it with the class.
 - 6. Encourage healthy competition among participants.**
 - Use games to create competition and energy among groups or teams.
 - Use project methods to keep the class active and competitive.
 - Divide the class into teams to answer review questions.
 - 7. Show participants your own interest and enthusiasm!**
 - Allow participants to see your own excitement about the subject!
 - Make yourself available before and after the session, and encourage participants to come to you with ideas and questions.
 - Use eye contact and body language that exudes confidence and energy.
 - 8. Define the long-term objectives and purpose for knowing the information.**
 - Help the participants realize the long-term benefits of knowing and using the information you are presenting.
 - Present information that shows them the "big picture."
 - 9. Validate the participants' personal motives.**
 - Let participants know that their personal motives are not only acceptable, but also encouraged.
 - 10. Help establish personal connections and relationships among the participants.**
 - Give participants opportunities to socialize with one another: on breaks, at lunch, and during social times outside of the classroom.
 - Make yourself available for social interactions with participants; arrive early and stay after the session, etc.
- Say or paraphrase: It may be difficult for you to stay in touch with the participants of every class you facilitate. However, if individuals from each class have the chance to connect during the time they attend your program, they may feel comfortable calling one another and expanding their support network when they return to their regular job roles. This is an ideal way to ensure an easy and wide-spread implementation of your program objectives.

Transition**Conduct an Activity**

Refer participants to
Workbook page ____

**11. Provide choices for participants, and let them choose.**

- Give participants several choices for activities or case studies from which to select and choose.
- As facilitators, who are your clients?
 - Participants
- Say or paraphrase: As a facilitator, one of your biggest responsibilities is to help information get into the brains of your participants. Knowing about some special needs of adult learning is important to that goal. There are a few other concepts that, once understood, will make you an even more astute facilitator.
- We'll look into the concept of Intake Styles next.

What To Do**Conduct the activity: Intake Styles****Activity: Intake Styles**

Purpose In this activity, you'll learn a bit more about your own learning style preferences in the form of Intake Styles using the Language System Diagnostic Instrument (LSDI) by Cresencio Torres.

Track the Time This activity requires approximately 10 minutes.



Instructions Using the instrument in your workbooks titled "The Language System Diagnostic Instrument," work individually as directed in the instructions for each of the three parts. After the activity, we'll talk about it.

Debrief By show of hands, who's learning preference is Visual? Auditory? Kinesthetic?

Why do you think it's important to understand learning intake styles?

The Language System Diagnostic Instrument

Cresencio Torres

Part One

Instructions: This instrument contains three parts. Part One consists of five sets of three paragraphs each. For each set, select the one paragraph that is easiest for you to read. Do not be concerned with the actual content of the paragraph, merely with how you respond to it compared to the other paragraphs in the set. Read all three paragraphs and then make your selection, but do not deliberate too long; your first response generally is best. Indicate the letter of the paragraph that you have selected on your answer sheet by circling the appropriate letter (A, B, or C) for each set.

You have five (5) minutes in which to complete the entire instrument.

1.
 - A. The tinkle of the wind chimes tells me that the breeze is still rustling outside. In the distance, I can hear the whistle of the train.
 - B. I can see the rows of flowers in the yard, their colors shining and fading in the sunlight and shadows, their petals waving in the breeze.
 - C. As I ran, I could feel the breeze on my back. My feet pounded along the path. The blood raced through my veins, and I felt very alert.

2.
 - A. I like to be warm. On a cold night, I like to relax by a warm fire in a comfortable room with a cup of smooth, warm cocoa and a fuzzy blanket.
 - B. The child talked into the toy telephone as though he were calling a friend. Listening to the quiet conversation, I could almost hear the echoes of another child, long ago.
 - C. The view was magnificent. It was one of the most beautiful things I have ever seen. The panorama of the green countryside stretched out clearly below us in the bright, sparkling sun.

3.
 - A. They appeared to be surprised when they noticed that there were other people on the beach. The amazement on their faces turned to eagerness as they looked as though they knew many of the people on the sand.
 - B. I was helped up and supported until I felt my strength coming back. The tingling sensation that ran up and down my legs--especially in my calves--was stronger after I stood up, and my body was extremely warm.
 - C. People will express themselves more verbally if they can talk about their interests or assets. You can hear the increased enthusiasm in their conversations, and they usually become more fluent.

4.
 - A. The feedback that the speaker received was an indication that she was communicating more effectively. The people in the audience seemed to be in tune with what she was talking about.
 - B. I want to understand how people feel in their inner worlds, to accept them as they are, to create an atmosphere in which they feel free to think and feel and be anything they desire.
 - C. Children watch adults. They notice more than we realize. You can see this if you observe them at play. They mimic the behavior of the grown-ups they see.

5. A. Creative, artistic people have an eye for beauty. They see patterns and forms that other people do not notice. They respond to the colors around them, and their visual surroundings can affect their moods.
- B. They heard the music as if for the first time. Each change of tone and tempo caught their ears. The sounds soared throughout the room, while the rhythms echoed in their heads.
- C. Everybody was stirred by the deep emotions generated by the interaction. Some felt subdued and experienced it quietly. Others were stimulated and excited. They all felt alert to each new sensation.

Part Two

Instructions: This part consists often (10) sets of items. Each item includes three lists (sets) or words. For each item, circle the letter (A, B, or C) of the set of words that is easiest for you to read. Do not focus on the meaning of the words. Try to work quickly.

6.	A. Witness Look See	B. Interview Listen Hear	C. Sensation Touch Feel
7.	A. Stir Sensitive Hustle	B. Watch Scope Pinpoint	C. Squeal Remark Discuss
8.	A. Proclaim Mention Acoustic	B. Texture Handle Tactile	C. Exhibit Inspect Vista
9.	A. Scrutinize Focus Scene	B. Articulate Hearken Tone	C. Exhilarate Support Grip
10.	A. Ringing Hearsay Drumbeat	B. Movement Heat Rushing	C. Glitter Mirror Outlook
11.	A. Dream Glow Illusion	B. Listen Quiet Silence	C. Motion Soft Tender
12.	A. Upbeat Listen Record	B. Firm Hold Concrete	C. Bright Appear Picture
13.	A. Feeling Lukewarm Muscle	B. Hindsight Purple Book	C. Hearsay Audible Horn
14.	A. Show Observant Glimpse	B. Tempo Articulate Sonar	C. Move Powerful Reflex
15.	A. Purring Overhear Melody	B. Smooth Grasp Relaxed	C. Glowing Lookout Vision

Part Three

Instructions: This part consists of ten sets of three short phrases each. In each set, circle the letter (A, B, or C) of the phrase that you find easiest to read. Try to complete this task in the time remaining.

16.	A. An eyeful	B. An earful	C. A handful
17.	A. Lend me an ear	B. Give him a hand	C. Keep an eye out
18.	A. Hand in hand	B. Eye to eye	C. Word for word
19.	A. Get the picture	B. Hear the word	C. Come to grips with
20.	A. The thrill of the chase	B. A flash of lightning	C. The roll of thunder
21.	A. Outspoken	B. Underhanded	C. Shortsighted
22.	A. I see	B. I hear you	C. I get it
23.	A. Hang in there	B. Bird's eye view	C. Rings true
24.	A. Clear as a bell	B. Smooth as silk	C. Bright as Day
25.	A. Look here	B. Listen up	C. Catch this

Language System Diagnostic Instrument Scoring and Interpretation Sheet

Name _____

Instructions:

1. Transfer your responses from the LSDI to this score sheet by circling the letter you choose for each of the numbered items.

Part	No.	Column I	Column II	Column III
1	1	A	B	C
1	2	B	C	A
1	3	C	A	B
1	4	A	C	B
1	5	B	A	C
2	6	B	A	C
2	7	C	B	A
2	8	A	C	B
2	9	B	A	C
2	10	A	C	B
2	11	B	A	C
2	12	A	C	B
2	13	C	B	A
2	14	B	A	C
2	15	A	C	B
2	16	B	A	C
3	17	A	C	B
3	18	C	B	A
3	19	B	A	C
3	20	C	B	A
3	21	A	C	B
3	22	B	A	C
3	23	C	B	A
3	24	A	C	B
3	25	B	A	C
TOTALS		I _____	II _____	III _____

2. Now, total the letters circles in each vertical column. Place these scores from Columns I, II, and III in the box below.

3.

Column I _____ x 4 = _____ (Actual Score)
 Column II _____ x 4 = _____ (Actual Score)
 Column III _____ x 4 = _____ (Actual Score)

4. Multiply each of the column scores by 4. This will give you actual scores.
5. Chart your actual scores on the graph below by coloring in the space that represents your actual score in each of the three columns.

0	10	20	30	40	50	60	70	80	90	100
Column I Auditory										
Column II Visual										
Column III Kinesthetic										

6. Your highest score indicates the primary mode that you use to interpret and communicate with the world around you. You probably use this mode (auditory, visual, or kinesthetic) the most, particularly when you are problem solving or in stressful situations.

Your second-highest (middle) score indicates your secondary mode, which you likely use in everyday conversation, in combination with your primary mode.

Your lowest score indicates your tertiary mode, which you may not use as much as the other two or at all in your normal conversation. In fact, it often remains at the unconscious level.

These three modes of perceiving and talking about one's experiences are called "language representational systems." A visual person is likely to say, "I see" or "That looks right." An auditory person is likely to say, "I hear you" or "That sounds right," A kinesthetic person is more likely to say, "I've got it" or "That feels right." The Items that you selected on this instrument reflected these three systems or ways of describing experiences.

Each individual seems to be most comfortable in using one or two of these systems. Some people believe, however, that if an individual could learn to communicate in all three modes, or systems, he or she could establish more rapport and trust with people whose primary systems differ from his or her own. Increased ability to communicate in all three systems thus might lead to increased effectiveness in communication.

**Refer participants to
Workbook page _____****What To Do**

- Say or paraphrase: There are things we should know about these learning preferences.
- First, none are less valuable than others and should not be compared to someone else. All styles are important. It's also significant to know that a person can have a combination of preferred learning intake styles. Knowing your own preferred method to learn new things will be helpful as you begin to consider your role as facilitator.
- Let's consider some of the likely behaviors of learners for each of these three intake styles.

Visual

- About 60% of the U.S. public prefers to learn visually.
- The learner is most responsive to visual information, such as print, video, television, and overheads.
- When thinking, the eyes of visual learners drift upward. They tend to dress colorfully and stylishly because of their consciousness of their appearance. Visually descriptive words and phrases are often used for example: "I see what you mean," "I can picture that," or "That's a colorful demonstration." When providing driving directions, a visual learner is apt to describe and/or draw in landmarks that can be seen along the way.
- Visual learning may occur in one's mind's eye: they may process through imagination before talking or writing out a concept or idea.

Auditory

- This is the least common intake style, with about 15% of the U.S. population having this preference.
- The learner is most responsive to hearing the information, such as radio, books on tape, and classroom presentation.
- When thinking, an auditory learner might look straight ahead which may create a feeling for the speaker of being looked through instead of looked at.
- Contrary to what one might assume not all auditory learners are always musical. In fact, music can be bothersome, as it jams up their intake channel. This should be considered when using music in the classroom.
- Auditory learners speak clearly and distinctly. To others, they may sound monotonous and slow.
- Language an auditory learner may use is "I can hear what you're saying," "That sounds good," or "That's music to my ears."

Refer participants to
Workbook page ____



Transition

Kinesthetic

- This style is preferred by 25% of the population.
- The learner prefers to learn by doing, such as hands-on practice and simulations.
- When kinesthetic learners pause to think, they tend to look down.
- When asked for directions, a kinesthetic learner will quickly grab a pencil and paper and quickly draw out a map complete with all the places to stop and do things along the way (like restaurants for eating). This is different from the map a visual learner might draw because items on the kinesthetic learner's map will be about things to do rather than things to see.

What To Do

- Say or paraphrase: Research on adult learning indicates that the most significant learning occurs when learners not only "hear" but also "see" and "do."
 - Understanding intake styles will help you, as facilitator; understand the preferences so you can adjust activities to the needs of the learners.
 - Learners with different learning style preferences may do the same activity, but for different reasons. For example, note taking done by kinesthetic learners appeals to their need to move (writing) and to visual learners for their need to see (ink on paper).
 - Avoid the temptation to label learners. Rather, honor the variety of learners and their unique conditions.
 - Awareness of these intake styles may be particularly helpful for facilitators to act on when there's a disconnect with learners.
 - Recognize your own learning preferences and leverage them to help others learn.
-
- Say or paraphrase: There are many different philosophies about how people learn, and in particular, how adults learn and retain information.
 - A fundamental premise is that people have preferences of how they process new information. One of the most comprehensive theories on this topic was developed by Howard Gardner in his work that focused on the diverse ways people develop skills that are important in their lives.
 - Next, we'll be spending some time talking about that theory of multiple intelligences.

Conduct an Activity

Refer participants to
Workbook page ____

**What To Do**

Conduct the activity: Which of Gardner's intelligences do I prefer?

Activity: Which of Gardner's intelligences do I prefer?

Purpose In this activity, participants will take a multiple intelligence assessment.

Track the Time This activity requires approximately 7 minutes.

**Instructions**

1. Direct participants to the page in their workbook titled "Multiple Intelligences Assessment."
2. Allow people 4 minutes to complete the assessment and the scoring tool at the bottom.
3. Debrief the activity.

Some questions might be:

- Are you surprised with the results?
- How can you use this information?

Note to Facilitator: Track time, and keep participants informed when they have only a few minutes left to finish up.

Multiple Intelligences Assessment

Circle any statements that you feel apply to you.

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7
I have a song in my head	I meditate often	I like to talk about my problems	I liked English in school	I can do math in my head	I think in pictures	I like to play sports
I like to listen to music	I have personal goals	I am a leader	I like to read	I like rational explanations	I like to draw	I can't sit still long
I enjoy singing	I am independent	I need social events	I am a good writer	I categorize things	I'm good at finding mistakes	I speak with my body
Off key notes hurt me	I know my strengths	People come to me for advice	I like to use 'big' words	I like logic games	Color moves me	I feel emotions deeply

Enter the number of choices you selected from each column and find which intelligence you favor.

Column 1 (Musical Intelligence) = _____

Column 2 (Intrapersonal Intelligence) = _____

Column 3 (Interpersonal Intelligence) = _____

Column 4 (Linguistic/Verbal Intelligence) = _____

Column 5 (Math/Logical Intelligence) = _____

Column 6 (Visual/Spatial Intelligence) = _____

Column 7 (Bodily/Kinesthetic Intelligence) = _____

Debrief**Introduce the Topic:
The Original Seven
Intelligences**

- Say or paraphrase: Let's talk about the intelligences in more detail. As we're talking, think about your own learning intelligences and examples of how they've operated for you.

What To Do

- Say or paraphrase: As defined by Gardner, the following are the original seven intelligences:
 1. **I**nterpersonal
 2. **L**ogical and mathematical
 3. **S**patial and visual
 4. **M**usical
 5. **L**inguistic and verbal
 6. **I**ntrapersonal
 7. **B**odily and kinesthetic

Note to Facilitator: Use mnemonic learning process to create a way to remember these original seven intelligences (in advance of the training or with the training group).

One example from the Accelerated Learning Fieldbook is "**I** Last **S**ued **M**y **L**andlord **I**n **B**oston."

- Following are some descriptions of each of the intelligences drawn from the Accelerated Learning Fieldbook. Use these to help learners understand some strengths of each of the original intelligences, and to identify how their role in the classroom as trainers/facilitators can be leveraged with this knowledge.
- Remember, no intelligence is more valuable than another, and people may favor more than one at a time depending on the situation and their own personal make up.
- In fact, people not only have strength in three or four intelligences, they also have a need to *use* all three or four of their strengths.
- Say or paraphrase: This intelligence has an aptitude for understanding other people. Processing information by interacting with other people is how they learn. People who favor this intelligence may be empathetic, understanding of human nature, aware of goals and intentions of others, humorous and influential.
 - Famous person: Oprah Winfrey
 - Good careers: teacher, minister, politician, supervisor, social worker
 - Under stress: talks to someone else about their problems
 - Creative: creates new thoughts by bouncing ideas off of others

Interpersonal

**Logical /
Mathematical**

Ask: What are some appropriate training techniques for people with preferences for this intelligence?

Answers may include:

- Direct activities that require working in teams or pairs.
- Emphasize collaboration versus competition when providing ground rules.
- On teams, change leadership roles often.
- Change teams every half day or so.
- Make sure teams are mixed according to such things as experience with the topic, gender, culture, and other history.
- Assign role-plays for the teams.

- Say or paraphrase: Processing information analytically is a strength for people who favor logical/ mathematical intelligence.

- Famous person: Albert Einstein
- Good careers: scientist, accountant, programmer, mathematician, engineer
- Under stress: adds up the pros and cons of the problem mathematically
- Creative: breaks down a problem into concrete doable steps

Ask: What are some appropriate training techniques for people with preferences for this intelligence?

Answers may include:

- Use of checklists.
- Detail around pros and cons.
- Numerical summaries and research results.
- Problems on which to apply logic.
- Use of flowcharts with cause and effect.

Spatial / Visual

- Say or paraphrase: The aptitude for forming, playing with, and changing mental models and images of the world in one's mind is common in learners who favor the spatial / visual intelligence.

- Famous person: Frank Lloyd Wright (architect)
- Good careers: decorator, architect, artist, graphic designer, navigator
- Under stress: escapes through movies or reading
- Creative: makes things visually through painting or sketching

Musical

Ask: What are some appropriate training techniques for people with preferences for this intelligence?

Answers may include:

- Use charts and diagrams for illustrations.
- Mind map.
- Display agenda and other information using the window pane technique.
- Post the logistics / ground rules colorfully in the room.
- Use guided visualization and imagery.
- Highlight and emphasize key points using color.

- For these learners, the environment needs to be pleasing to the eye and they like to sit where they can see everything and everybody.
- A variety of color is pleasing to these learners. Examples of great opportunity to use color are posters, flowers, pencils, markers and paper. Overhead, PowerPoint and flipchart images are pleasing to those who favor spatial / visual intelligences.

- Say or paraphrase: Sensitivity to sounds including pitch, melody, rhythm, and tone are natural to folks with strength in this intelligence. This is true for both listeners and performers.
 - Famous person: Wolfgang Amadeus Mozart
 - Good careers: composer, singer, choir director, and sound recording engineer

Ask: What are some appropriate training techniques for people with preferences for this intelligence?

Answers may include:

- During class, play appropriate music.
- Create songs, jingles, poems, or raps.
- Use Choral Readings (demonstrated later in the program).
- Use common melodies to sing new terminology and definitions.

Linguistic / Verbal

- Say or paraphrase: Clear use of the spoken and/or written word are strengths of the linguistic / verbal intelligence. Relationships are nurtured with the spoken word for these learners and think in words.
 - Famous person: Maya Angelou (poet)
 - Good careers: writer, speaker, thespian teacher, newscaster, therapist
 - Under stress: logs thoughts in a journal.
 - Creative: uses metaphors, analogies, and storytelling to generate new thoughts

Intrapersonal

Ask: What are some appropriate training techniques for people with preferences for this intelligence?

Answers may include:

- Create opportunities for these learners to write, read, and journal for reflection.
- Use word-search and crossword puzzles.
- Compose poems and raps.

- Say or paraphrase: Quiet time and alone space is an aptitude for Intrapersonal learners. Intrapersonal strengths include self-knowledge through reflection time. Characteristics of Intrapersonal learners include goal orientation, independence, perseverance, and compassion.

- Famous person: Howard Hughes
- Good careers: monk, forest ranger, distance runner, psychologist, researcher
- Under stress: takes a long walk alone
- Creative: sits alone at a corner table in a coffee shop to think

Ask: What are some appropriate training techniques for people with preferences for this intelligence?

Answers may include:

- Request these learners to individually set and prioritize objectives.
- Write in journals for reflection.
- For Intrapersonal review, use guided imagery.
- Before team discussion, reflect independently on the topic.
- Time alone and with others (table groups) should be balanced.

- Note that a person may have strengths in both intra and interpersonal learning styles. In fact, research shows that one may be strong in both. For example, trainers are usually very highly interpersonal and enjoy being with people, but have equally strong needs to be alone (especially after a full day of training facilitation).

Bodily / Kinesthetic

- Say or paraphrase: Physical movement is an aptitude for this intelligence. This means that learning occurs through touch and manipulation of objects and/or involvement of whole bodies.
 - Famous person: Larry Bird (basketball player)
 - Good careers: athlete, mom, gym teacher, trial lawyer, waitperson, surgeon
 - Under stress: goes for a long run to sort out issues
 - Creative: thinks while tossing a ball around or clicking a pen

Ask: What are some appropriate training techniques for people with preferences for this intelligence?

Answers may include:

- Role-play.
 - Simulation through games.
 - Rearrange seating assignments often.
 - Use anecdotes, stories, and analogies with lots of action and emotion.
 - Create scavenger hunts (for long, dull documentation review).
 - Pass out job aids and tools (laminated is good for tactile learners).
- Bodily / Kinesthetic people learn while they are moving which may be distracting for other learners.

Ask: What are some appropriate training techniques for people with preferences for this intelligence?

Answers may include:

- Provide a safe way for these folks to move by providing tactile tools on the tables such as pipe cleaners, note cards, markers, and bendable objects.
- A training room with several specially designated spaces is good for this type of learner. For example, consider creating zones designated for snacks, computers, quiet time, supplies, and perhaps even zones for topics (product, compliance, resources, etc.).

Conduct an Activity

Refer participants to
Workbook page ____

**What To Do****Conduct the activity: Choral Reading – Effective Skills Practice**

To help reinforce the information we've just covered, let's do a choral reading.

This tool is borrowed from the Accelerated Learning Fieldbook, by Lou Russel. Copyright 1999 by Jossey-Bass/Pfeiffer.

Activity: Choral Reading – Effective Skills Practice

Purpose

In this activity, participants will read and/or hear a script to help reinforce the concept of multiple intelligences.

Track the Time

This activity requires approximately 7 minutes.

**Instructions**

1. Ask for nine volunteers, assigning each one a role from the reading below.
2. Direct the reading to begin.
3. Debrief the activity.

Some questions might be:

- What did you learn from this reading that we didn't cover before?
- What were you reminded of?
- For which intelligences would this activity be most valuable?
- How can you use this information?

Note to Facilitator: Please be sure to make 9 copies of the "Choral Reading: Effective Skills Practice," located on the following pages, for use during this activity.

Choral Reading: Effective Skills Practice

NARRATOR: The setting is a conference room gathering of trainers. Their boss, a middle manager in a Fortune 500 company, has called the meeting. She has arranged the meeting to obtain input from the training team. Her concern: why field managers complain that trainees spend so much time in the training room yet are unable to transfer learned skills into actual practice. Once the issue has been stated, the training staff starts to respond.

GARDNER SEVENS (a learning consultant): I think we really do a great job of presenting new information. Where we may be lacking is in the proportion of time we allow to *practice* the new information, compared to the actual teaching time.

BETSY BOSS: Huh? Oops! I mean, can you be more specific?

GARDNER SEVENS: Sure. Global research has proven beyond the shadow of a *doubt* that, in order to substantially improve learning *transfer*, we must *reverse* the amount of time we spend teaching to the amount of time the trainees actually spend *rehearsing* newly learned *information*. According to scientific findings, we should spend 20-30 percent of the time teaching and 70-80 percent of the time allowing learners to activate the material in a *meaningful way*.

BETSY BOSS: OK. I'm intrigued. Tell me more.

GARDNER SEVENS: Many of us in this room have been interested in the research of *Howard Gardner* at *Harvard University* in Cambridge, Massachusetts. His years of intensive personal and *team* research have proven that standard IQ tests fail to measure true intelligence. They only measure linguistic and logical/*mathematical* skills.

BETSY BOSS: So? What's the point? How does this relate to your discussion?

GARDNER SEVENS: Inez, help me out here.

INEZ INTRAPERSONAL: Gardner has clearly determined that, once information has been taken in, whether *auditorily*, *visually*, or *kinesthetically*, each person has three or four ways in which he or she *processes* the new information. Altogether, *seven* processing styles (or intelligences) have been unequivocally identified.

I confess, I'm at my best when I'm allowed to work alone. It's not that I can't work with others. It's just that sometimes I get overwhelmed by team input and need to be off by myself for a while. That's when my thoughts get real clarity.

Once they've taken concrete shape, I can function better as a member of a team, but not for extended periods of time. Overuse of team activities in any situation causes me to withdraw and not carry through with my best work.

BETSY BOSS: I'm still lost.

LARRY LINGUIST: People like and respect me because I communicate well, both *orally* and on paper. But the same isn't true for Sue. Right, Sue?

SUSAN SPATIAL: Right! And it's not that I value my dominant processing style any less, but I know understand that different people need the opportunity to *process* information in other ways than mine. Not all people learn anything by fooling with a Rubik's Cube! Or designing a twenty-first-century condo! Matt?

MATTHEW MUSICAL: Exactly! I love music and rhythm. But not everyone is engaged by exercises and *activities* that engage that particular preference. For them to learn, they may also *need* rehearsals that involve *logic* and mathematics.

LEO LOGICAL: I learn best by breaking problems down to their smallest *parts*. I find flaws in other people's thinking this way. My middle name is *Deductive!* But, contrary to popular opinion, I don't go to a party... even a learning party... with my ledgers under my arm! I also love to *interact* with all kinds of people!

IRENE INTERPERSONAL: Wow! Yes! Me, too! I know I'm smart all by myself, but somehow, my most wonderful ideas and *solutions* flow best when I'm with other people! When I have to work alone, I feel isolated... like I'm working in a *vacuum*. Bev, what about you?

BEVERLY BODILY: Well, you see me always tapping my fingers when I'm thinking. And pacing the floor when I'm working out the details of an idea. Or shifting positions when I have to sit through long classes or meetings. I need to MOVE! I need to be DOING! And when I get fidgety, other people look at me like I'm either disrespectful, not with it, or some kind of FLAKE! And you all laugh at me when I get *emotional!* But *feeling* deeply helps me to learn and grow. That's my preferred processing *style*. Certain kinds of *music* also help me concentrate and clarify my thoughts. And I love the challenge of *analyzing* raw data. I don't mind writing progress reports and usually go to Larry when I can't find exactly the right words. So, I know I process information differently than he does.

BETSY BOSS: Tell me again about percentages, Gardner.

GARDNER SEVENS: In order to maximize the potential of learning *transfer* from the *classroom* to actual *on-the-job* situations, we must do one thing: as quickly as possible, reverse the *ratio* of training time to *practice* time. Ideally, we should spend 20-30 percent of the time training and 70-80 percent of the time allowing learners to practice in ways that honor and *respect* individual processing styles.

NARRATOR: Betsy Boss nods her head wisely. The need for some significant changes must be conveyed and, the change itself, implemented.

Gardner Sevens smiles, confident that the message has gotten through. Inez Intrapersonal goes off by herself to contemplate her role in this change. Larry Linguistic sits down at his word processor to draft a letter to other colleagues about the progress that has been made. Susan Spatial goes off to play with her Rubik's Cube and redesign a diagram for her next training. Matthew Musical retreats to his cubical, puts on his I-pod and listens to Bach. Leo Logical mind maps all the possible outcomes of the meeting and charts the most likely scenario. Irene Interpersonal can't wait to get on the phone and share her thoughts about the meeting with anyone who will listen. Beverly Bodily paces her nine-by-ten-foot cubicle, chews on her pencil, sits down, stands back up, taps her feet, drums her fingers, looks anxious, and then sits down to summarize the meeting for everyone else!

Conduct a Group Discussion



What To Do

Conduct a class discussion by asking:

- Why do you think it is so important that we have an awareness of our own learning style?
- **Direct the discussion to make sure these key points are covered.**
 - Many times we may be teaching to our own learning style, which may not be effective for all participants.
 - If we are aware of the differences in the learning styles, we can be flexible and adjust to the needs of our participants.
 - Why should multiple intelligences be used in the classroom?
- **Direct the discussion to make sure these key points are covered.**
 - The design and implementation of training activities should consider all the intelligences to help ensure that all learner needs are met as well as possible.
 - If all the intelligences are honored, also honored are the intake styles we discussed earlier (visual, auditory, and kinesthetic).

Intake Style	Multiple Intelligence(s)
Visual	Spatial/visual, naturalist
Auditory	Linguistic/verbal, musical, existential
Kinesthetic	Bodily/kinesthetic, emotional

- Though challenging, the results of attempting to meet the needs of all learning styles is worth the reward: better learning results!

Transition

- Say or paraphrase: We've covered a lot of information so far about how people learn. There are a variety of intake styles and multiple intelligences, which are different for each learner.
- Use of brains differs from person to person, too. In this next segment, we'll talk about brain dominance theories and how they affect learning, and how in your role as facilitator you can impact maximum learning with this knowledge.

The Brain and Learning

*Content reference:
Accelerated Learning
Fieldbook*

- It makes sense, then, that if a person doesn't feel happy and healthy and/or alive, the brain will do its job to block these less than positive feelings. That's especially true in a training environment.

The Left Brain

- There's an awful lot to know about the brain and how it works. For the purposes of this class, we'll provide an overview of the key points that may influence your facilitation of learning events. By hitting the highlights, you'll understand more about your influence on the learning process.
- There are three main parts to the brain, each very important. Left, right, and center (the corpus callosum).
- Common understanding is that brains function best when all parts are active, and that most people tend to favor either the left or right side of the brain. Each side is important, and knowing your preference will help you understand how you process information, what you pay attention to, and how you communicate.
- Use the following diagram to highlight important concepts of the functions of left-brain, right-brain, and corpus callosum.
- Say or paraphrase: Sometimes referred to as the academic brain, this hemisphere is used for thinking about such things as:
 - Facts
 - Numbers
 - Black-and-white data
 - Structure
 - Planning
- This segment:
 - Is very organized
 - Likes predictability and repetition
 - Controls much of the right side of the body
- Things this side of the brain likes are:
 - Sequences and steps
 - Explanations from detail and facts rather than the big picture
 - Words, letter, icons
 - Reading the directions before trying them
 - Facts, related and not
 - Structure and predictability
- People who favor their left brain are likely to have a very organized and clean workspace.

The Right Brain

- Say or paraphrase: This hemisphere is more artistic than the left and likes:
 - Fantasy
 - Color
 - Emotion
 - Patterns
 - What-Ifs
 - Looking at things with a different perspective

The Corpus Callosum

- This part of the brain:
 - Gets bored easily with repetition
 - Controls much of the left side of the body
- The right side of the brain likes:
 - Randomness
 - Big picture rather than detail
 - Pictures, graphs, charts
 - Learning by seeing, hands-on
 - Spontaneity, open-endedness, surprises
 - Integration
- People who favor their right brain are likely to have a workspace full of piles and seeming disarray.
- Say or paraphrase: This is the segment that lies between the left and right hemispheres of the brain.
- Its job is to function like a telephone cable to connect the left and right parts of the brain to allow communication between the two.
- When both parts of the brain are active, the corpus callosum is actively engaged in its job.

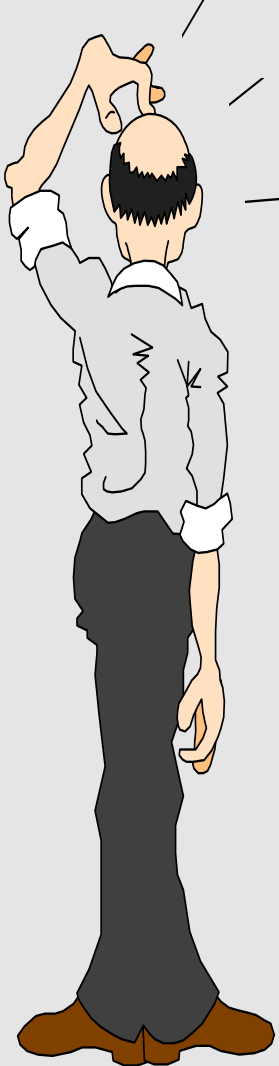
Conduct a Group Discussion



What To Do

Conduct a class discussion by asking:

- While facilitating learning, how can you address the whole brain?
- Is it important to address both left and right brains while facilitating?
- **Direct the discussion to make sure these key points are covered.**
 - Honor the whole brain – for example learning that involves lots of formula and calculation can be done on colored paper.
 - Be aware of your brain preferences and alert to your tendency to teach the way you think.
 - Share big picture AND details to address the learning needs for both sides of the brain.
 - Create learning that is both structured AND flexible.
- Say or paraphrase: Activities and exercises that are suitable for mostly left brained participants might not work at all for right brained people.
- Depending on the preferences of your audience, to address their needs you may need to tailor the marketing of the workshops. For example, managers may relate to facts and data while their employees may relate to emotional benefits.

Left Side	Corpus Callosum	Right Side
<p>Logical</p> <ul style="list-style-type: none"> • Facts, related and not • Statistics • Formulas • Sequences and steps • Explanations from detail and facts (instead of the big picture) <p>Verbal Ability</p> <ul style="list-style-type: none"> • Formal • Conversational • Words, letters, icons • Reads the directions before trying them <p>Use it or Lose it</p> <ul style="list-style-type: none"> • Academics • Algebra I <p>Uses</p> <ul style="list-style-type: none"> • Objective data • Details • Problem solving • Structure and predictability 		<p>Emotional</p> <ul style="list-style-type: none"> • Five senses • Intuition • Feelings • Spontaneity, open-endedness, surprises <p>The "Bad" Stuff</p> <ul style="list-style-type: none"> • Four letter words • Stutters • Forgets <p>Remembers</p> <ul style="list-style-type: none"> • Music • Rhymes • Bicycle riding <p>Creative</p> <ul style="list-style-type: none"> • Randomness • Pictures, graphs, charts • Learn by seeing and hands on <p>Uses</p> <ul style="list-style-type: none"> • Big picture rather than detail • Stories • Examples • Analogies • Integration

Transition**Retention and Memory****The Process of Memory**

So, now that we've got people learning, how can we help them remember?

- Use a prepared flipchart:

"What I hear, I forget;
What I see, I remember;
But what I do, I understand."
-Confucius, 451 B.C.

- Introduce the topic and make these key points:
 - Memory is important in accelerated learning because it drives how well learners retain new or changed learning.
 - To accelerate learning, a person must remember and recall with less effort.
 - Retention rates are better when learning consists of both presentation and application.
 - Adults need to discuss, experiment, discover, analyze, create, and apply information in an interactive manner for long-term learning and retention to occur.

There are multiple steps to the process of memory. Following is one formula which maps to this process:

Receive	Exposure to learning from outside of self.
Filter	Unconscious or conscious choice of whether or not you will allow the learning in.
Store	The process of putting the new learning in memory and creating paths to access it.
Recall	Remembering learning by accessing the paths to it in the brain.

Learning event facilitators have a great influence on how people retain what they learn.

- Ask participants to guess the following retention rate percentages, then provide the actual percentages.

Retention Rates

	<u>3 Hours Later</u>	<u>3 Days Later</u>
Describing Alone	70%	10%
Describing and Showing	72%	20%
Describing, Showing, Doing	85%	65%

Information Retention

10% Read
20% Hear
30% See
50% See and Hear
70% Say it with trainer
90% Say it while doing it

Things to Know About Memory

So, how can learning facilitators impact information retention?

As with the brain, many theories and studies have been made about how people retain information. We'll be highlighting some key information that will help facilitators target their approach to help participants learn and retain information.

First, an exercise for you.

Conduct an Activity



What To Do

Conduct the activity: Memory Experiment

Refer participants to
Workbook page ____



Activity: Memory Experiment

Purpose In this activity, participants will attempt to memorize words and will identify with some key theories on memory.

Track the Time This activity requires approximately 7 minutes.



- Instructions**
1. Direct participants to the page in their workbooks titled "Memory Experiment," to have a pencil and a blank page of paper handy.
 2. Ask them to spend 2 minutes reading through the list of words (no writing).
 3. Once time is up, direct learners to turn to a blank page and write out all the words they can remember from the list (without looking at the list).
 4. Direct the reading to begin.
 5. Stop reading after allotted time (1-2 minutes).
 6. Debrief the activity.

Memory Experiment

water, live, dog, line, home, mouse
field, balls, rabbit, apple, sheep, head,
bone, year, goat, Maharishi, hill
oar, donkey, shape, crop, wind, pig,
tool, cow, door, stone, flower, cat

Some questions might be:

Comparing your list to the list of words you studied, how many did you remember correctly?

How many remembered all the words?

How many remembered the first word?

How many remembered the last word?

How can you use this information?

**Introduce the Topic:
Primacy and
Recency****What To Do**

- Say or paraphrase: Depending on your approach, you may have remembered more or less of the words. For example:
 - Generally people remember the first few and last few words. The tendency to remember the first part of a list is called the primacy affect and that of the last few words is called the Recency effect.
 - From this we can understand that people in a training situation best remember the content shared at the beginning and the end of a session or lesson.
 - Research has shown increase in long-term retention when many short breaks are allowed instead of a few long breaks. More retention occurs when there are more breaks due to the effect of recency and primacy.

**Conduct a Group
Discussion****What To Do****Conduct a class discussion by asking:**

- While facilitating learning, how can you use the theories of primacy and recency to help your class participants remember more information?

Direct the discussion to make sure these key points are covered.

By creating activities that help participants retain key information. For example, Koosh Ball reviews, Jeopardy review, and/or a musical/rap review.

Review exercises are critical to memory and retention. Both learners and facilitators can also access the learning achieved to that point. It's a great way for the facilitator to figure out what the group knows and doesn't quite understand, so that they can readjust the lessons if necessary. Learners become more aware of how much knowledge they've acquired.

Conduct an Activity

Refer participants to
Workbook page ____

**What To Do**

Conduct the activity: How do people learn – What will you implement?

Activity: How do people learn – What will you implement?

Purpose

To plan and implement what you have learned in this section to use when you facilitate your own sessions.

Track the Time

This activity requires approximately 5 minutes.

**Instructions**

Using your tool kit pages, take some time now to think about and write out some activities that you've learned to this point.

Who demonstrated or told you about it?

How is it implemented?

What do you need to?

Introduce the Topic: Strategies for Strengthening Learning

Refer participants to
Workbook page ____



Introduce the Topic: Using Different Learning Formats

Conduct a Group
Discussion



Refer participants to
Workbook page ____



What To Do

- Say or paraphrase: When facilitating a session, the transfer of knowledge can be a group experience, not a teacher-to-student experience.
- Make these Key Points:
 - Your role as facilitator is to manage the process of learning
 - by creating and managing an environment where the group can teach each other through sharing their beliefs, experiences, and ideas or by working through a process together. Provide examples.
 - It is your mind set, enthusiasm, commitment, and belief that will ensure the success of your facilitation.
 - The knowledge transfer is a two-way process between group members and the facilitator, as well as a process that occurs among the various group members themselves.

Power Tip: Try to present ideas in a discussion format. Let participants come up with the ideas as you direct and guide them.

What To Do

- Say or paraphrase: Depending upon the situation, various learning formats may be necessary to use with adult learners.

What To Do

Conduct a class discussion by asking:

- What are the various delivery channels and modeled learning formats used for learning, and when is each of these most effective?
- Listen for these answers:
 - Classroom: allows face-to-face interaction, relationship building, and skill practice with other participants
 - eLearning: allows easy access to fact-based information, good for pre-work or independent study
 - Conference Call: allows training to occur when travel is not an option
 - Roleplay
 - Discussion
 - Case Study
 - Skit
 - Hands On
 - Action Planning, Reflection Time

Conduct a Group Discussion**Transition****Conduct an Activity**

Refer participants to
Workbook page ____

**What To Do****Conduct a class discussion by asking:**

- Thinking back on the various delivery channels and modeled learning formats, which of these are most appropriate for each of the learning styles?
- What are the benefits of each and the limitations?
- What are some ways the facilitators today demonstrated how to do this?

First, an exercise for you.

What To Do

Conduct the activity: How do you learn? How do you teach?

Activity: How do you learn? How do you teach?

Purpose In this activity, participants will explore their learning and teaching styles.

Track the Time This activity requires approximately 7 minutes.



Instructions

1. Direct participants to the two-sided page in their workbooks titled “How do you learn? How do you teach?”
2. Ask them to think about a time when they were teaching, to think about how it looked.
3. Direct learners to take 3 minutes to draw a picture of themselves teaching.
4. Reinforce the idea that drawing skill doesn’t matter in this exercise and encourage participants to use a variety of colors if they wish.
5. Ask participants to continue to think about their teaching drawing and to add detail regarding surroundings. Consider sounds—consider the activities and physical space.
6. After 3 minutes, ask them to use the other side of the page and draw themselves learning. Again consider what the physical space looks like, what time of day it is, what they are doing and what they hear.
7. Allow 3 minutes for this, too.
8. Ask participants to reflect on their drawings.
 - Is one drawing/sketch happier than the other? Why?
 - Is the participant more confident in one picture over the other? Why?
 - How are the surroundings in the pictures the same? How are they different? Why?
 - In the perfect world, what do you need to be a terrific learner? A superb trainer? How are these roles connected?
9. Debrief the activity.

Some questions might be:

 - What did you learn?
 - How will you implement what you learned?

Your Role in the Learning Process

- Say or paraphrase: Because you're the leader of learning events, it's very important to get in touch with what this means.
- Thinking about your role and how you wish to develop it is quite important. We'll talk more about your significant influence on the training process throughout this session.

Elements of Effective Lesson Plans

- A large part of the effective transfer of skill and knowledge is achieved through sequencing the course content with activities.
- There are a variety of "formulas" that facilitators use to ensure they are tapping into what is known about how people learn.
- In the best circumstances, training materials used by facilitators will incorporate these theories and formulas in their recommendations for how time is spent in the classroom.
- Whether or not guides specifically incorporate these formulas, it's important that facilitators recognized and follow their charge to implement events that help people learn.
- One such model is referenced as the ADA approach (**A**ctivity, **D**iscussion, **A**pplication).
- Another is referenced as CPR (**C**ontent, **P**articipant Activity, **R**etention).
- One of the main concepts is variety of experience. In a training classroom it's a good idea to shift activity every 20 minutes or so. This supports what we've been talking about in relation to how the brain works, the intelligences and intake styles.

Activities and Debrief

- Say or paraphrase: Facilitators with a good track record of knowledge and skill transfer don't just know the content; they implement a variety of activities.
- Say or paraphrase: It's important to consider the following:
 - When it comes to activities, it's important to choose those that add value to the content, honor multiple intelligences, and match the needs of the group.
 - Most learning occurs not in the activity, but in the debrief of the activity.
 - Debriefing is the most important part of this formula for knowledge and skill transfer.
 - Well-designed debrief questions are essential to the learning. You are encouraged to create your own questions to meet the learning needs of your audience.

**Introduce the Topic:
Variety of Roles****Refer participants to
Workbook page ____****Conduct an Activity****Refer participants to
Workbook page ____****What To Do**

- Say or paraphrase: In the classroom, although you are referred to as the leader and /or instructor – which implies training and facilitation, a third role is often present—that of LEARNER.
- As earlier addressed, as you lead a class you may fluctuate between facilitator and trainer. Ideally a trainer will transition to facilitator as they invite learners to become partners in their own learning process.
- The third role for instructions, that of learner is equally important and value adding. If an instructor is receptive to the idea, they can learn many new things everyday in the classroom.
- Primarily instructors will learn about content and how people learn.
- To understand this three pronged approach to your role will help you be increasingly successful.

What To Do**Conduct the activity: What's your mission?**

Activity: What's your mission?

Purpose In this activity, participants will begin the creation of their mission statement in relation to their role of instructor.

Track the Time This activity requires approximately 7 minutes.



Instructions

1. Direct participants to the page in their workbooks titled "What's your mission?"
2. Ask them to choose their three favorite verbs when they think about the word "learning" to complete the following phrase:

I _____, _____, and _____ learning

One example is

"I enjoy, relish, and inspire learning."

3. Debrief the activity.

Some questions might be:

- Are you surprised with the words that you chose?
- How challenging was it to come up with a description of your association with learning?
- What did you learn?
- How will you implement what you learned?

Conduct an Activity

Refer participants to
Workbook page ____

**What To Do**

Conduct the activity: How do people learn? What will you implement?

Activity: How do people learn? – What will you implement?

Purpose

To plan and implement what you have learned in this section to use when you facilitate your own sessions.

Track the Time

This activity requires approximately 5 minutes.

**Instructions**

Using your tool kit pages, take some time now to think about and write out some activities that you've learned to this point.

Who demonstrated or told you about it?

How is it implemented?

What do you need to?

Preparing to Facilitate the Course

Note to Facilitator

The purpose of this segment is to discuss and provide ways for participants to efficiently and effectively prepare to facilitate a course.

Track the Time



This segment requires 2 hours and 25 minutes.

Transition

- Say or paraphrase: Now that you have an awareness of the characteristics of the adult learner, of good behaviors and practices to use when facilitation, and of the benefits of facilitation when working with adult learners, let's take a look at what you should do to prepare for facilitating a session.

Introduce what will be discussed in this segment

What To Do

- Introduce the following topics that will be covered in this segment of the training.
 - How to quickly and effectively prepare yourself to facilitate a class
 - How to organize the materials you will use
 - How to make the best of your training location

Refer participants to Workbook page ____



Introduce the Topic: Preparing to Facilitate

What To Do

- Make these key points:
 - It is important to be well-prepared before you facilitate a session.
 - Preparing quickly and efficiently is key.
 - How well you prepare before the session will greatly impact the success of the facilitation.

Conduct a Group Discussion



Introduce the Topic: Understanding the Difference Between Teaching and Facilitating

Refer participants to Workbook page ____



Conduct a Group Discussion



What To Do

Conduct a class discussion by asking:

- What are some ways in which you would prepare to facilitate a class?
- Listen for these answers:
 - Observe another facilitator
 - Take notes
 - Check the database for the latest Facilitator Guide
 - Plan to accommodate each of the learning styles
 - Review the Facilitator's Guide and Participant materials
 - Use checklists
 - Create, update, or review the At-A-Glance storyboard
 - Create flipcharts and other visuals
 - Customize materials for a specific audience
 - Practice with another facilitator
- Share with the participants how you prepared for this session.

What To Do

- Say or paraphrase: Now that you have a basic understanding of Adult Learning Principles and adult learning needs, let's take a look at the similarities and differences in teaching and facilitation.
- Say or paraphrase: This chart provides a list of similarities and differences for both teaching and facilitation.
- Each of these methods are appropriate depending on the situation. Some types of learning experiences lend themselves very well to teaching methods, where others are better presented using facilitation methods. In some cases, it is appropriate to use both.
- Reinforce that there is no right or wrong method. You will use both.

What To Do

Conduct a class discussion by asking:

- Think of the different learning styles. Which of these categories are going to appeal to each of the different styles and why?
- Direct the discussion around which learning style is most comfortable with each of the different types of presentation.

Teaching	Facilitation
<p>Teacher</p> <ul style="list-style-type: none"> • Lectures • Demonstrates • Gives directions 	<p>Facilitator</p> <ul style="list-style-type: none"> • Listens and observes • Enables the learning process • Shares own experiences and background
<p>Students</p> <ul style="list-style-type: none"> • Listen • Complete exercises and take test 	<p>Participants</p> <ul style="list-style-type: none"> • Interpret and comprehend own experiences and background
<p>Materials</p> <ul style="list-style-type: none"> • Text Books • Presentations • Hand-out Materials • Structured Activities 	<p>Materials</p> <ul style="list-style-type: none"> • Same as teaching materials • Interaction of group members
<p>Goals</p> <ul style="list-style-type: none"> • Specifically stated, the same for each student • Measurable 	<p>Goals</p> <ul style="list-style-type: none"> • May differ for each participant, within a reasonable framework for the subject matter • Action Oriented, SMART
<p>Climate</p> <ul style="list-style-type: none"> • Competition • Individual is Graded, Scored 	<p>Climate</p> <ul style="list-style-type: none"> • Cooperation • Personal Goals, Personal Measurement
<p>Ownership</p> <ul style="list-style-type: none"> • Teacher • Structured, sequential process 	<p>Ownership</p> <ul style="list-style-type: none"> • Participants • Open, inquisitive process

Conduct a Group Discussion



Transition

Refer participants to Workbook page ____



Note to Facilitator:

This might be flipcharted and posted to use as a guiding principle for the class.



Introduce the Topic: Room Environment

Refer participants to Workbook page ____



What To Do

- Say or paraphrase: Now that you have seen some examples of teaching and facilitation techniques, let's look at the situations in which these techniques help the learning experience for adult learners.

What To Do

Conduct a class discussion by asking:

- When would teaching or lecture be most beneficial?
- What are some situations in which facilitating would be preferential to teaching or lecture?

Remember when we discussed the principles of adult learning. Let's tie these back to some of the things we've learned today.

- Map the benefits to these key principles/ideas:
 - Participants need to see value in the information presented in order for it to be effective.
 - Goals and objectives must be clear to the participants.
 - Participants can and will make mistakes, and that's o.k. Learning includes the opportunity to make and rectify mistakes.
 - Experience is a value and should be drawn upon.
 - It's important to take what participants already know and tie it in with new facts and information. (People don't resist change – they resist loss.)
 - Frequent feedback for participants is necessary during learning.
 - Information learned should be discussed, shared, and debated.
 - It's important that participants feel that they are being listened to and are respected by the facilitator and their peers.
 - Participants should have input on how the training will be conducted.
 - Differences in participants' background and experience are recognized.

What To Do

- Say or paraphrase: For group members to interact most effectively, it's helpful to have the optimum room arrangement for your class. Most of the time we don't have control over the location, but this is good information to know if you do have control over the location.

- Make these key points:
 - The physical set-up of the room determines how well participants can see you (and each other), as well as their ability to view visual materials, such as flipcharts.
 - When setting a classroom, be sure that each chair has clear vision of the key areas in the room.
 - Other factors to consider in room arrangement are the amount of control it affords you as facilitator and the level of participation it encourages from attendees.
 - Arrangement of the classroom tables and chairs sets the tone for the learning experience.
 - Briefly review and describe the five typical room arrangements.
 1. Traditional Classroom
 2. Horseshoe Shape
 3. Closed Rectangle
 4. Cluster Style (of rounds or rectangle tables)
 5. Angled Rows

Conduct a Group Discussion



Refer participants to
Workbook page ____



What To Do

Conduct a class discussion by asking:

- How does this arrangement benefit the facilitator? Are there significant drawbacks?
- Does this arrangement encourage class discussion?
- Does this arrangement facilitate splitting up into subgroups?
- What is the overall atmosphere created by this arrangement?
- How does this arrangement affect the learning experience?

Power Tip: *When participants are placed in groups, individuals can learn skills from one another. Grouping encourages participants to combine their collective knowledge and resources to generate ideas and problem solve.*

Conduct a Group Discussion

Organizing the Materials



Refer participants to Workbook page ____



What To Do

Conduct a class discussion by asking:

- What are some ways in which you would prepare your materials and other resources you will use for the session?
- **Direct the discussion to make sure the following key points are covered. Ask participants to provide examples of how they would accomplish each of these.**

- **IMPORTANT: Let participants know that we will be covering how to create (design) and use visuals most effectively later in the session. This discussion should focus on preparation prior to class, NOT design principles or how to use visuals.**

1. Participant Materials, Handouts and Other Resources

- Make sure you have copies for everyone.
- Communicate to participants about any materials you are expecting them to bring to the session. Follow up to make sure they are clear on the instructions.
- Distribute the materials prior to the session, or make sure participants know to bring copies with them.
- Make sure you have copies of any Class Evaluations on hand to distribute at the end of the session.

2. Permanent and Toss-Away Flipcharts

- Create permanent flipcharts that contain information you will reuse for other sessions. Use toss-away flipcharts when you are capturing feedback from the participants.
- Review the materials and create headings on the flipcharts to allow you to quickly capture participant feedback during the session.
- Post completed flipchart pages on the wall for use as reference and reinforcement aids throughout the day.

3. Overheads

- Review the materials and create the overheads you will need for the session.
- Keep overheads simple; do not try to include too much information.
- When you are not using the projector, even for a few moments, turn it off. The glare can annoy your audience.

4. LCD, Video, and Other Audio-Visual Equipment

- Make sure the equipment is available.
- Prior to beginning the session, test the equipment to make sure it is working properly.



**Introduce the Topic:
Using Planning
Agendas**

**Refer participants to
Workbook page ____**



5. Computer Systems

- Make sure there are enough systems available to accommodate the number of participants scheduled to attend the session. Plan to double-up participants if there is not enough equipment available.
- Prior to beginning the session, test the equipment to make sure it is working properly.

Power Tip: *When possible, use music in the background to:*

- *Encourage reflection*
- *Keep participants energized*
- *Create a welcoming atmosphere*
- *Enhance creativity*

What To Do

- Say or paraphrase: Take a look at the tips in your Participant's Workbook to use when you plan your agenda for a training day. These tips provide insight into the best time to conduct certain activities throughout the day.

Tip Sheet: Planning Agenda Tips

- Conduct an Icebreaker or Session Starter to get participants engaged and energized.
- 9:30-11:00 a.m. – The best time to provide technical information.
- After lunch – Use a high-interaction activity to get participants back into the session.
- Breaks – Give frequent breaks.
- 3:00-3:30 p.m. – The hardest time to keep participants focused. Think of ways in which you can engage participants and keep the energy level high.
- End of Session – Have evaluations completed while the participants are still in the room. Let the participants know that you are glad they attended the session and that you will be available afterwards for any questions they may have.
- If you have time constraints during the session, remember the needs of adult learners and ask the participants' permission to shorten breaks or to change the agenda.

**Introduce the Topic:
Being Able to
Prepare Quickly**

Refer participants to
Workbook page ____



Conduct an Activity



Refer participants to
Workbook page ____



What To Do

- Share tips about how other trainers practice.
- Demonstrate how to use the At-A-Glance storyboard to quickly prepare.
- Share tips about how you prepare.

What To Do

**Conduct the activity: Review Facilitation Basics/Planning –
What will you implement?**

Activity: Review Facilitation Basics/Planning – What will you implement?

Purpose To plan and implement what you have learned in this section to use when you facilitate your own sessions.

Track the Time This activity requires approximately 5 minutes.



Instructions Using your tool kit pages, take some time now to think about and write out some activities that you've learned to this point.

Who demonstrated or told you about it?

How is it implemented?

What do you need to?

Optimizing the Learning

Note to Facilitator

The purpose of this segment is to provide ideas and ways for facilitators to optimize learning by considering other techniques (such as assessing comprehension and rewarding participants).

Track the Time



This segment requires 2 hours and 15 minutes.

Transition

- Say or paraphrase: Next, let's take a little time to discuss some ways that will optimize learning by enhancing the basic skills we have already covered.

Introduce what will be discussed in this segment

What To Do

- Introduce the following topics that will be covered in this segment of the training.
 - How to read the audience and assess comprehension
 - How to demonstrate flexibility in adjusting to time constraints and participants' needs
 - Ways to review and reinforce information
 - Ways to reward and recognize participants

Refer participants to Workbook page ____



Introduce the Topic: Reading the Audience and Assessing Comprehension

What To Do

- Say or paraphrase: It is important in your role as facilitator to look for "clues" from participants to know when they are following at the required pace and are understanding the information being presented. This will enable you to adjust the session, by reinforcing information already covered, giving further information on specific topics, or deleting information that may be confusing or unnecessary, according to the needs of the participants.

Conduct a Group Discussion



Refer participants to Workbook page ____



Present the Topic: Know Your Audience

Conduct a Group Discussion



Refer participants to Workbook page ____



Present the Topic: Demonstrating Flexibility

Refer participants to Workbook page ____



What To Do

Conduct a class discussion by asking:

- What are some “clues” you’ve experienced that help you assess your participants? Why are these clues important? What were you able to do when you noticed a clue?
- How might the clues vary depending on the learning style of the participant?

What To Do

- Say or paraphrase: An effective facilitator KNOWS the audience and then plans delivery techniques and instructional methods that will enhance learning based on this knowledge.

What To Do

Conduct a class discussion by asking:

After you have assessed the audience, what are some creative ways in which you can make the session interesting and relevant to participants?

- Listen for these answers:
 - Relate the individual benefits of knowing this information (the WIIFM: “What’s in it for me?”).
 - Share relevant and interesting stories, analogies, and anecdotes.
 - “Paint pictures” to generate enthusiasm.
 - Share personal experiences.
 - Pose questions to stimulate further discussion.

Map each of these to the four learning styles.

- Say or paraphrase: All facilitators must periodically adjust the materials, timing, or delivery methods to accommodate the needs of participants.

Conduct a Group Discussion



Refer participants to Workbook page ____



What To Do

Conduct a class discussion by asking:

- What are some ways you can adjust the material or delivery when you are facilitating a session? What is the impact on the participants?
- What adjustments would you make to accommodate each of the learning styles or situations?
- List their ideas on a flipchart.
- *Say or paraphrase: Here are common scenarios that require you to adapt and some ways to do so.*

“Help – I think they’re all falling asleep!”

- Make these key points:
 - Pay careful attention to nonverbal cues. If several participants are squirming or look bored – ask the group if it’s time for a break, or try a change of venue. Perhaps it’s time to get them involved. Be creative.
 - Ask the participants for help. Use an open-ended question such as, “How are we doing with this material?” Find out what you need to do to adjust the class to make it interesting and fun for them. Students are also responsible for making the class successful.

“I’m not sure they are getting it.”

- Make these key points:
 - When students are unclear about a specific point and you’re struggling to explain something in their language, try having another student explain it to them. For example, “I must not be explaining this very clearly. I can really use some help. Can anyone else help to clarify this point for Jane?”
 - Let participants work in teams or pairs to present material to the group. Give them time in class to prepare if possible. Provide guidelines and expectations. Sit back, relax, and rest your voice.
 - Give participants an opportunity to share their real-life experiences with the subject matter. This will improve the learning curve and retention. Refer to the examples whenever you can, and make references to their current knowledge base to provide transfer of information.

**Introduce the Topic:
Reviewing,
Reinforcing,
Recognition, and
Reward**

**Ask for Personal
Reflection**



**Refer participants to
Workbook page ____**



**Refer participants to
Workbook page ____**



“I’m running out of time.”

- Make these key points:
 - Keep close track of time as you progress through each segment or lesson.
 - Mark times to begin and end activities on your notes, At-A-Glance storyboard, or Facilitator’s Guide.
 - If you have to delete material, cut from the middle, not the beginning or end.
 - Ask participants to help select the material that you will need to skip.
 - Identify in the materials what is Need to Know, Nice to Know, and Reference.

What To Do

- Say or paraphrase: Next, let’s think about the importance of reinforcement and some ways in which information can be reinforced for the learner.

What To Do

- Ask participants to take a minute or two to think about something they have learned recently (a sport, a game, or techniques related to work) and ask themselves:
 - Did the learning require more than just absorbing new information? Can you describe the process?

- Make these key points:

- In most cases, successful learning requires acquiring knowledge, reviewing and reinforcing the information, and developing new skills.

What To Do

- Say or paraphrase: Research proves that adults learn best when they receive support and when their progress and skills are positively acknowledged.

- Make these key points:

- The way a facilitator recognizes and rewards behavior is critical in building participants’ self-esteem and keeping participants engaged.
- Learning is an emotional process.
- Learning only occurs when individuals want to learn.
- Learning that actually changes a person’s behavior cannot occur unless the learner experiences a positive and energizing emotion, such as purpose, anticipation, or excitement.
- Learning occurs on an individual basis, with individual time frames and individual mental processing patterns.

Conduct Break-out Group Exercise: Behaviors and Practices



Refer participants to Workbook page ____



Introduce the Topic: Providing Next Steps

What to Do

- Present instructions:
 1. This is going to be a break-out group exercise. (Have participants return to the groups in which they conducted the last break-out group exercise.)
 2. Working in your groups, take 10 minutes to brainstorm ways to recognize and reward participants. List these on the flipchart paper.
 3. We will then come back together and each group will select a Group Leader who will have an opportunity to share the group's responses.
- Conduct the exercise.
 - Visit each group once during the exercise to see if they have any questions. Refocus the group if they are not on track.
 - Two minutes before the end of the exercise, announce how much time remains, and remind the groups that they need to be finishing up.
- Debrief the exercise.
 - Ask each of the leaders to take a turn and share the group's findings.
- Possible questions to ask:
 - What impact will this specific form of recognition have on the learner?
 - Would this be appropriate for all learning styles? For which learning styles would it be appropriate, and why?

What To Do

- Say or paraphrase: In addition to reviewing previously-covered information, provide adult learners with "Next Steps" and ideas to continue the learning after the session is completed.
- Ask how facilitators can conduct and debrief action planning with impact?
- How can you follow up with participants after class?

Managing Your Class

Note to Facilitator

This segment of the session will help participants learn ways to manage their classes more effectively.

Track the Time



This segment requires 45 minutes.

Introduce what will be discussed in this segment

What To Do

- Introduce the following topics that will be covered in this segment of the training.
 - Common challenging behaviors and methods of discouraging the behaviors
 - Providing effective feedback
 - Using breaks effectively

Refer participants to Workbook page ____



Introduce the Topic: Dealing With Challenging Participants

What To Do

- Say or paraphrase: Even with the best preparation and facilitation techniques, there will be times when you need to deal with challenging participants.

Introduce the Topic: Guidelines for Handling Participants' Behavioral Issues

What To Do

- Say or paraphrase: Let's look at some approaches to handling common behavioral issues in a classroom setting. As we review each of these, think about what you have learned about learning styles, and how you might need to be flexible to accommodate each.

Refer participants to Workbook page ____



Arguers

Arguers enjoy a good argument. Do not encourage them by arguing back. Instead, turn their argumentative statements over to the group by saying, "What do the rest of you think?" If these argumentative behaviors persist, handle the situation during a break. Explain to Arguers how their actions negatively affect group dynamics, distort learning objectives, and convey an unprofessional image.

Complainers

Validate the complaint, which may be legitimate, but point out that we are not here to change policy. If appropriate, indicate that you will discuss the problem with the participant privately.

The Disengaged

The Disengaged are often employees with extensive work experience. They could be carrying around a lot of negative baggage. Encourage them to “try on” the new ideas. Find a role where they can shine, and their wealth of experience can be helpful.

Interruptive

Interruptive participants continually get the discussion off track with extraneous comments. Be kind, but then ask a question of the group that will bring the subject into focus once again. If this occurs several times, be more blunt. State, “That’s an interesting comment, but we have to stay on track to complete the agenda for today, so...”

Know-It-Alls

Know-It-Alls “know all the answers” – or think they do! Their attitude can stifle conversation and make others resentful. They can be discussion killers. To nip their attitude in the bud, ask them a couple of direct, specific questions – not general, broad-based questions. This action may reduce their effect on other participants.

Sharpshooters

The sharpshooter is always trying to shoot you down or trip you up. Admit it if you do not know the answer and redirect the question to the group or back to the individual who asked it. Acknowledge that this is a joint learning experience. Enlist the aid of supportive individuals to back you up.

Silent

Draw Silent participants into the discussion by calling on them by name or asking direct, but easy, questions. Also, ask them to relate their experiences to the subject under discussion. Avoid focusing on these types too much, as they may feel threatened. Give strong positive reinforcement for any contribution.

Sleepers

Sometimes you may have a participant who appears bored or disinterested by the subject matter – or by you! Don’t let it worry you. Sleepers are a close relation to Know-It-Alls. You may be able to arouse their interest by involving them in the conversation.

Talkers

Work to control the amount of time Talkers dominate the discussion, yet don’t “shut them down” completely. Direct questions to other participants whenever possible. If the talking continues, discuss the problem with them during a break. If necessary, ask them to “hold back a little” so others have a chance to participate.

Conduct an Activity

Refer participants to
Workbook page ____

**What To Do**

Conduct the activity: Dealing with Challenging Participants

Activity: Dealing With Challenging Participants

Purpose

The purpose of this activity is help participants find ways to deal with challenging behaviors they may encounter while facilitating a session.

Track the Time

This activity requires 20 minutes.

**Instructions**

Break participants into small groups and assign one of the challenging behaviors. Ask the groups to brainstorm and flipchart how they would deal with the behavior, and present their findings to the class.

Introduce the Topic: Coping with Side Conversations

What To Do

- Say or paraphrase: **Side conversations are sometimes a sign of confusion or disinterest.** Try walking over to the area of the room where the conversation is taking place and asking a general question. Stand or sit in that space for a while until the talkers quiet down and you have gained control. Try to establish eye contact with the talkers.
- Say or paraphrase: Remember, some side conversations are on the subject. A student may be looking for a text page or have another question about the topic. It's important not to embarrass adult learners or make them feel powerless in the classroom environment.
- Say or paraphrase: Take a moment to consider how you are facilitating. Are you appealing to their learning style? Is there something you should do differently to appeal to their learning style as it relates to distractions and side conversations?

Conduct a Group Discussion

What To Do

Conduct a class discussion by asking:

- What are the most important considerations to make when providing feedback to participants? Why? How does it make them feel?
- Listen **for these examples:**
 - Be descriptive and specific – so participants understand what they are doing right and what they need to do differently. Give examples whenever possible. Say: "You were correct because..."
 - Be nonjudgmental – do not judge the person, consider only the outcome/response.
- Make sure to mention Balanced Feedback.

Introduce the Topic: Providing Effective Feedback



Refer participants to Workbook page ____



What To Do

- Say or paraphrase: Take a look at the tips in your Participant's Workbook for additional ideas on effective ways to provide participant feedback.

Introduce the Topic: Using Breaks Effectively

Conduct a Group Discussion

Ways to get
participants to
return from breaks
in a timely manner



Refer participants to
Workbook page ____



What To Do

- Say or paraphrase: Breaks and how you use them are also important factors when facilitating a training session. Items such as the timing of the breaks, state laws, and how to get participants to return from the breaks should all be considered.
- Make these key points:
 - A good rule of thumb is to provide a five minute break for every hour of training.
 - Explain information about the California State law.

What To Do

Conduct a class discussion by asking:

- What are some creative ways you can get participants to return from breaks?
- Listen for these answers:
 - **Time Out**
 - When announcing breaks, use odd times: “We’ll break until 11:07.”
 - **Musical Note**
 - Play music during breaks, and to signify the end of the break either significantly raise or lower the volume to get the participants’ attention.
 - **Rewards to Follow**
 - Offer points to the participants for activities you want them to be involved in. For example: give one point to each person who is back from the break on time; give double the points when all persons from a table are back from the break on time.
 - **School Bell**
 - Have one of the participants volunteer to ring a bell to signal the end of break time.
 - **Lights Off**
 - Flick the lights off and on, as if signaling the end of intermission at a theatre performance.
 - **Puzzling It Out**
 - Post a word puzzle, trivia question, or some activity on a flipchart at the beginning of break time. Make it challenging and intriguing, to get participants back in their seats and involved in the group setting following the break.

Introduce the Topic Making Yourself Appear Confident

Conduct a Group Discussion



Refer participants to Workbook page ____



Refer participants to Workbook page ____



– **Helpful Hints**

- Promptly at the close of break time, begin the session by sharing a few valuable training tips or hints. Indicate that you won't repeat them, and request that the participants who are there to hear them not share them with those who are late returning from break.

– **Follow the Leader**

- Have one person at each table volunteer to be the "break leader" – the first to stand up and lead the way at the start of the break and the first to return at the end of break time (signaling that the others are to follow immediately).

What To Do

- Say or paraphrase: A key factor in presenting an effective message is displaying self-confidence. The following tips will help build your confidence before and during a session.

What To Do

Conduct a class discussion by asking:

- What are some techniques you can use to make yourself less nervous or appear more confident?
- Listen for these answers:
 - Whenever you are feeling a little nervous, it's best to encourage audience participation, so you're not doing it "on your own."
 - Use deep breathing and other calming techniques to feel better.
 - Try moving around the classroom a little. It will help you to feel calmer.
 - Don't read from a script or handout; use your personal style to enhance the interest level.
 - Don't worry! The adrenaline effect you feel will help you to sound more enthusiastic and interesting to the students.

What To Do

- Say or paraphrase: Take a look at the tips in your Participant's Workbook for ways to reduce nervousness.

Tip Sheet: Tips and Tricks for Reducing Nervousness

Before

- Make sure you are wearing an outfit that you have worn before, that is comfortable and makes you feel confident. Don't try a new outfit on the day of a presentation; it could distract you.
- Don't have anything in your pockets or wear excessive jewelry during a presentation. Unconsciously "playing with" these items can make you appear restless and uneasy.
- Prepare! Prepare! Prepare! Thoroughly prepare and practice for your presentation. You can break your presentation down into sections and focus on one section at a time if it appears overwhelming to you.
- Imagine your presentation going smoothly and being successful.
- Think about experiences you had in the past where you were successful and came out a winner, and recall how good you felt at that moment.
- Keep reiterating to yourself phrases that will calm your nerves, such as: "I can do this, I've practiced, and I am thoroughly prepared for this presentation."

During

- Remember to breathe fully, inhaling and exhaling completely to calm yourself.
- It's important to always look people in the eye when speaking and to stand tall, with your shoulders back. It displays confidence to the participants as well as to yourself.
- Look for an audience member who is giving positive feedback and focus on her when you feel nervous.

After

- To build confidence that will last long term, always remember to give yourself rewards for successful presentations.

Conduct an Activity

Refer participants to
Workbook page ____

**What To Do**

Conduct the activity: Managing Your Class – What will you implement?

Activity: Managing Your Class – What will you implement?

Purpose

To plan and implement what you have learned in this section to use when you facilitate your own sessions.

Track the Time

This activity requires approximately 5 minutes.

**Instructions**

Using your tool kit pages, take some time now to think about and write out some activities that you've learned to this point.

Who demonstrated or told you about it?

How is it implemented?

What do you need to?

Using Visual Aids

Note to Facilitator

This segment of the session will provide participants with ideas and basic design principles for using common visual aids when facilitating a session.

Track the Time



This segment requires 40 minutes.

Introduce what will be discussed in this segment

What To Do

- Introduce the following topics that will be covered in this segment of the training.
 - The importance of visual aids
 - Tips for designing and using various visual aids

Refer participants to Workbook page ____



Introduce the Topic: Using Visual Aids

What To Do

Why do we use Visual Aids?

- Say or paraphrase: When visual aids are used properly, participants learn much more in a given period of time.
- Say or paraphrase the following key points:
 - Significantly less time is needed to present a concept when using visual aids.
 - A more positive response is invoked when visuals are used to supplement an oral presentation.
 - Common barriers of language, space, and time can be reduced with the use of visual aids.
 - There are two types of visual aids:
 - **Projected** – Including LCD, videotapes, slides, computer graphics, overhead transparencies.
 - **Nonprojected** – Flipcharts, pictures, audiotapes, bulletin boards, marker boards, and chalk boards.

Refer participants to Workbook page ____



Refer participants to
Workbook page _____



Conduct a Group
Discussion

Using Visual Aids



Introduce the Topic:
Designing and Using
Visual Aids

Briefly revisit the following:

Benefits of Using Visual Aids

Method of Instruction	Recall 3 Hours Later	Recall 3 Days Later
Telling when used alone	70%	10%
Showing when used alone	72%	20%
When a blend of telling and showing is used	85%	65%

Prepare a flipchart with the following:

People Generally Remember:

- 10% of what they READ
- 20% of what they HEAR
- 30% of what they SEE
- 50% of what they SEE and HEAR
- 70% of what they SAY as they TALK

What To Do

Conduct a class discussion by asking:

- What are some ways in which you have used visual aids? What are some ways in which you have experienced visual aids used effectively and creatively?

What To Do

Preparing Visual Aids

- Say or paraphrase: As the phrase “visual aids” implies, these are items which assist you in teaching – and the class participants in learning. And these aids are things that can be seen. This makes visual aids worthwhile tools, since seeing something is a more effective method of learning it than is hearing, smelling, or touching it.

Refer participants to
Workbook page ____



Using Flipcharts
Effectively

Refer participants to
Workbook page ____



Basic Rules for Preparing Visual Aids

- Make these Key Points:
 - Before designing any visual aid, ask yourself the following question: “why am I going to use a visual for this?” Your answer will indicate whether a visual aid is appropriate for the purpose.
 - Limit your use of visual aids for another reason as well: intersperse them with other formats to break the monotony, for participants, of looking at too many visuals.
 - Design your visuals with a horizontal focus.
 - Place all material to fit proportionally inside the available “frame.”
 - Use color with a specific purpose, not just to “dress up” the visual.
 - As much as possible, focus on a single message for each visual.
 - Give the viewer clues about where to look (the focus of the visual) by the use of color, graphics, or highlighted words.

- Say or paraphrase: Flipcharts can be used for two purposes: (1) to record information during a class presentation, and (2) to create, ahead of class time, visuals to which you refer during the session. They are an effective method of presenting information only to small groups (not more than 20 people); for larger groups, people sitting farther from the charts may not be able to see them.

- Make these Key Points:
 - To use flipcharts to the best advantage, remember the following tips.

For charts made in advance:

- Cover these with two or three sheets of blank paper until you are ready to show them.
- On individual charts, cover main points with strips of cut paper – which you can remove one by one, as you explain each idea.
- Use the charts to make an outline for classroom use: before the presentation, write the information very lightly, in pencil on the charts; then, as you speak during the class, use markers to fill in data so that it is visible to participants.

To make charts more appealing and easier to read:

- Write with brightly-colored markers.
- Add interest by highlighting information – draw a box around key phrases, underline key points, draw some simple graphics.
- Write on only the top two-thirds of the sheet. This leaves room to add more ideas after you put the page on a wall of the room for display.

Using Overheads Effectively

Refer participants to Workbook page ____



As you use the flipchart:

- Turn to a prepared chart when you begin speaking about information written on it.
- Stand to the side of the chart as you discuss the information, and touch each individual item as you talk about it.
- Tear off the chart as you finish with it, and tape it to a wall which is visible to all participants. This serves as a reminder of topic content as you go through the session.

Additional Tips for using Flipcharts

- Use dark pen colors that are easily visible, never light colors like yellow or pink.
 - Keep the information simple.
 - Do not write too small – write large enough that it can be read from the back of the room.
 - Don't talk as you write – your back will be to the audience, and you will not be heard.
 - Use various bright colors for attention control.
 - You may pre-plan your outline in pencil on the flipchart.
- Say or paraphrase: Overheads are an effective method of presenting information to larger groups. When creating overheads, keep the following items in mind:
 - Minimize details.
 - Think of ways to represent the idea graphically.
 - Keep text simple and readable (limit to 6 lines of 6 words per line). Use key phrases instead of sentences.
 - Use titles.
 - Overheads should be easily read 6 feet away.
 - o Make sure text is 24 points in size or larger.
 - o Avoid italics, when possible.
 - Include at least 40% "white space" to the extent they are 40 percent blank.
 - Use a series of overheads (instead of a single overhead that contains many words), when trying to communicate a complex idea.
 - Maintain consistency in design. For example if you use borders, use the border on all overheads.

- Make these Key Points:

Tips for using Overhead Projectors

- Control what your audience sees by using paper strips to reveal select portions.
- Write on the overhead to add information as you go. Use a non-permanent ink that can be removed with a damp cloth.
- Use a pointer to draw attention to something on the overhead.
- Overlays can help simplify the presentation of complicated concepts.
- Use the edge of the mounting frame for your notes.

Using Videos Effectively

- Make these Key Points:

Tips for using Video

- Preview the video ahead of time. Look for points at which the video can be stopped to facilitate immediate discussion, or make note of discussion points to be reviewed at the end of the video.
- Make sure the tape is rewound and cued to the proper starting point.
- Set the mental stage for presentation of the video.
- Allow sufficient lighting in the room for note taking.

Using an LCD Effectively

What To Do

Display the Using an LCD Effectively file on the LCD.

- Say or paraphrase: When using an LCD:
 - Familiarize yourself with the equipment and read the operation manual.
 - Practice setting up the equipment.
 - Set up well in advance. Allow yourself plenty of time to set up your computer and the LCD projector. Check any last minute details.
 - Check the LCD projector bulb.
 - Have spare bulbs and cables on hand.
 - Before you facilitate the session, practice your presentation to make sure it looks the way you expect, and you are comfortable with the equipment.

Note to facilitator: Let participants know that detailed technical instructions are included in the back of the Participant's Workbook.

LCD Instruction:

- Picture images supported by words both verbal and written on slides provide highest learning impact.
- Keep works to a minimum and when possible use pictures to present the concept.
- A visual to which a verbal explanation can be added emphasizes key learning point(s).
- When using a series of slides, it is helpful to the students if they are given time to absorb the information (i.e., show a few slides, stop and discuss what has been seen, then show a few more followed by a discussion).

**Introduce the Topic:
Facilitators Don't
Have to Know
Everything!****Note to Facilitator:**

You may want to write these on a flipchart.

**Refer participants to
Workbook page ____****What To Do**

- Make these key points:
 - You do not need to be the technical expert to successfully facilitate a session.
 - Your role is to manage the learning and provide a learner-centered environment that guides the group to discover the information.
 - Good facilitators pay as much attention to the dynamics of the group as to the content of the discussion or session.
 - Your role is to create a forum for discussion, promote constructive debate, help the group articulate goals, and help the participants discover for themselves.

Effective Class Wrap-Up

Note to Facilitator

This segment of the session presents effective ways to wrap up the class and the importance of effective class evaluations.

Track the Time



This segment requires 40 minutes.

Introduce what will be discussed in this segment

What To Do

- Introduce the following topics that will be covered in this segment of the training.
 - Why class evaluations are important to improving future classes
 - Tips for ending a session

Refer participants to Workbook page ____



Conduct a Group Discussion

What To Do

Conduct a class discussion by asking:

- Why is class evaluation important?
- Say or paraphrase: Class Evaluation provides a quick opportunity for participants to express their feelings.
 - Participant feedback helps improve future sessions.
 - Participant feedback enables participants to feel they are contributing to future learning sessions.

Class Evaluation



Evaluation Form

The evaluation form allows participants to provide feedback on the session content, methods, and delivery. You will need to:

Refer participants to Workbook page ____



- Distribute the evaluation form at the conclusion of the session.
- Ask participants to complete the form and submit it to you before leaving the session.
- Review the session evaluations.
- Provide a session follow-up report to appropriate parties upon request.

Conduct an Activity

Refer participants to
Workbook page ____

**Tips for Ending a Session**

- Revisit action items and assignments and confirm due dates.
- Ask each person to share one action they will take in the next week as a result of the team session.
- Develop a game or quiz for the team to see how many questions they can answer correctly about the meeting content. For example, if the meeting was a “get acquainted” meeting for a new team, one question might be: “Which person on your team has been to Disney World three times?”
- Ask for one thing each person learned in the session.
- Have each person draw a picture of something they learned in the meeting. Then have others guess it.

What To Do

Conduct the activity: Closing / Wrap Up – What will you implement?

Activity: Closing / Wrap Up – What will you implement?

Purpose To plan and implement what you have learned in this section to use when you facilitate your own sessions.

Track the Time This activity requires approximately 5 minutes.



Instructions Using your tool kit pages, take some time now to think about and write out some activities that you’ve learned to this point.

Who demonstrated or told you about it?

How is it implemented?

What do you need to?

Course Closing & Follow-Up – Continuing the Learning

Note to Facilitator

This brief section will discuss follow-up activities the RTM may request (depending upon regional policy, such as e-mailing participants to determine if the class met their expectations).

Track the Time



This segment requires 30 minutes.

Introduce what will be discussed in this segment

What To Do

- Introduce the following topics that will be covered in this segment of the training.
 - Resources available to facilitate
 - Action Planning that may include some additional resources available for independent study

Refer participants to Workbook page ____



Introduce the Topic: Resources for Facilitators

- Mention the following additional resources for the new facilitators to learn more about training.
 - Associations
 - Periodicals
 - Websites
 - E-newsletters
 - Books

Conduct an Activity



What To Do

Conduct the activity: What Are Your Goals to Become a Better Facilitator?

Refer participants to Workbook page ____



Activity: What Are Your Goals to Become a Better Facilitator?

Purpose

This activity will help participants evaluate their strengths and weaknesses as facilitators, and define steps to take toward improving their facilitation techniques.

Track the Time

This activity requires approximately 30 minutes.



Instructions

1. Divide participants into groups of 4-6 members, and ask each group to move their chairs into a circle.
2. Distribute blank paper, envelopes, and pencils to each group (one set per person).
3. Ask each participant to create a STRENGTHS LIST – a list of five strengths they feel they have as a facilitator.
4. Have participants spend two minutes each sharing these identified strengths with the other group members.

Note to Facilitator: Track time, and keep participants informed when you are getting ready to announce the next step in the exercise.

5. Ask each participant to prepare another list – a CHALLENGES LIST. This list should include five challenges they feel affect them as a facilitator.
6. Again, have participants spend two minutes sharing their listed items with the other group members.

Note to Facilitator: Track time, and keep participants informed when you are getting ready to announce the next step in the exercise.

7. Next, ask each participant to list the five steps they think they need to follow to achieve their goals as a facilitator, as well as any factors (or barriers) which have prevented the goals from being achieved in the past.
8. Have each group review the participants' lists, one at a time. The group as a whole should:
 - Discuss and map the participant's strengths from the Strengths List that will be helpful to achieve the goals.
 - Provide suggestions for additional steps to obtain the goals.
 - Prioritize the steps to obtain the goals.
 - Next, ask each participant to capture these items on the action planning page in their Participant Workbooks.
9. Have participants send the Action Plan to their RTMs.

Note to Facilitator: As you finish up the session, make sure you acknowledge everyone's contribution and participation.

Reflection**What To Do**

- Ask participants to take a minute or two to think about the things they think they do well as a facilitator, as well as areas in which they would like to improve. Ask them to jot these items down in their Participant Workbooks.
- Refer to the flipchart that has the participants' personal learning objectives listed.
- How successful were we in meeting your personal learning objectives?
- What did you learn that applies to this?
- Ask for volunteers to share with the group.