

Introduction to Facilitation Skills



Participant's Guide



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How to Deliver Successful Learning

Learning Objectives

In this segment, we will discuss:

- ❑ Various intake styles and understanding the role of facilitator to tap into them
- ❑ Multiple intelligences and their roles in learning
- ❑ Whole brain theories
- ❑ The role of the facilitator in the development of memory and retention

Overview of Adult Learning

The Basic Characteristics of Adult Learners

- ➔ Adults are self-directed. Adults need to be free to direct themselves.
- ➔ 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.
- ➔ 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.
- ➔ 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.
- ➔ Adults need to feel respected.



How to Deliver Successful Learning

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?

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

Facilitators:

-
-
-

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

Facilitators:

-
-
-

3. **Adults are _____ _____.** **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:

-
-
-



How to Deliver Successful Learning

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 _____ the learning.

Facilitators:

-
-
-

5. Adults need to feel _____.

Facilitators:

-
-
-



Notes



How to Deliver Successful Learning

1. Create a _____ for the participants to _____ the _____.

Example:

2. Find ways to _____ the participants' own _____.

Example:

3. _____ and _____ the participants' _____.

Example:

4. Emphasize the practical _____ of the information.

Example:



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5. _____ and _____ the participants' input.

Example:

6. Encourage _____ among participants.

Example:

7. Show participants your own _____ and _____!

Example:

8. Define the _____ and _____ for knowing the information.

Example:



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9. Validate the participants'

_____.

Example:

10. Help establish personal _____ and _____ among the participants.

Example:

11. Provide _____ for participants, and let them choose.

Give participants several choices for activities or case studies from which to select and choose.

Example:



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Learning Styles



Activity: Intake Styles

Instructions: Using the “The Language System Diagnostic Instrument,” located on the following pages, work individually as directed in the instructions for each of the three parts.



How to Deliver Successful Learning

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.



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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.



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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



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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



How to Deliver Successful Learning

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 _____



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

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

- Multiply each of the column scores by 4. This will give you actual scores.
- 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										

- 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.



How to Deliver Successful Learning

Retaining What We Learn



Intake Styles

Visual

Auditory

Kinesthetic



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

Instructions: Complete the assessment and the scoring tool located on the following page.



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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) = _____



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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



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Activity: Choral Reading – Effective Skills Practice

Instructions: Follow along and fill in the blanks below.

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 _____ 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 _____ that, in order to substantially improve learning _____, we must _____ the amount of time we spend teaching to the amount of time the trainees actually spend _____ newly learned _____. According to scientific findings, we should spend _____ percent of the time teaching and _____ percent of the time allowing learners to activate the material in a _____.

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



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GARDNER SEVENS: Many of us in this room have been interested in the research of _____ Gardner at _____ University in Cambridge, Massachusetts. His years of intensive personal and _____ research have proven that standard IQ tests fail to measure true intelligence. They only measure linguistic and logical/_____ 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 _____, _____, or _____, each person has three or four ways in which he or she _____ the new information. Altogether, _____ 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 _____ and on paper. But the same isn't true for Sue. Right, Sue?



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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 _____ 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 _____ that engage that particular preference. For them to learn, they may also _____ rehearsals that involve _____ and mathematics.

LEO LOGICAL: I learn best by breaking problems down to their smallest _____. I find flaws in other people's thinking this way. My middle name is _____! 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 _____ 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 _____ flow best when I'm with other people! When I have to work alone, I feel isolated... like I'm working in a _____. 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 _____! But _____ deeply helps me to learn and grow. That's my preferred processing _____.

Certain kinds of _____ also help me concentrate and clarify my thoughts. And I love the challenge of _____ 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.



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BETSY BOSS: Tell me again about percentages, Gardner.

GARDNER SEVENS: In order to maximize the potential of learning _____ from the _____ to actual _____ situations, we must do one thing: as quickly as possible, reverse the _____ of training time to _____ time. Ideally, we should spend _____ percent of the time training and _____ percent of the time allowing learners to practice in ways that honor and _____ 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.

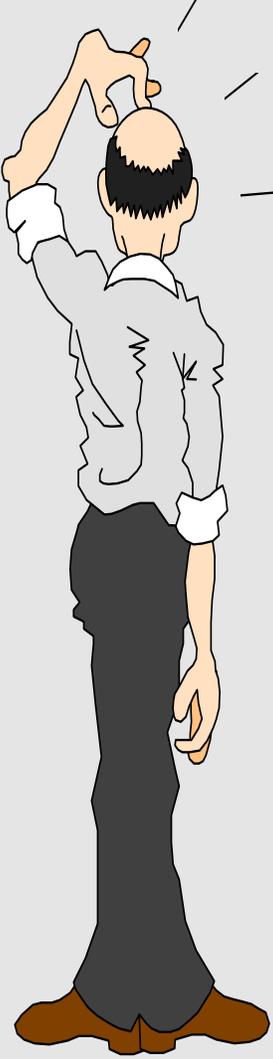
Leo Logical mind maps all the possible outcomes of the meeting and charts the most likely scenario.

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!



How to Deliver Successful Learning

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



How to Deliver Successful Learning

**"What I hear, I forget;
What I see, I remember;
But what I do, I
understand."**

- Confucius, 451 B.C.=



Key Points:

- 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.



How to Deliver Successful Learning

Retention Rates		
	<u>3 Hours Later</u>	<u>3 Days Later</u>
Describing Alone		
Describing and Showing		
Describing, Showing, Doing		

Information Retention

- _____ Read
- _____ Hear
- _____ See
- _____ See and Hear
- _____ Say it with trainer
- _____ Say it while doing it



Activity: Memory Experiment

Instructions: Complete the assessment and the scoring tool located on the following page.

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



How to Deliver Successful Learning

Strategies for Strengthening Learning



Key Points:

- Your role as facilitator is to _____
– 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.

Examples:

- It is your _____, _____, _____, and _____ that will ensure the success of your facilitation.

Examples:

- The knowledge transfer is a _____ - _____ process between group members and the facilitator, as well as a process that occurs among the various group members themselves.

Examples:



How to Deliver Successful Learning



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

- How do you learn?

- How do you teach?



Activity: What's your mission?

Complete the following phrase:

I _____, _____, and
_____ learning



Preparing to Facilitate the Course

Learning Objectives

In this segment, we will discuss:

- How to quickly and effectively prepare to facilitate a class
- How to organize the materials you will use
- How to make the best of your training location



Key Points:

- It is important to be well-prepared before facilitating a session.
- Preparing quickly and efficiently is key.
- Being well-prepared before the session will greatly impact the success of the facilitation.

What are some ways in which you would prepare to facilitate a class?

- _____ another facilitator.
- Take _____.
- Check the database for the latest Facilitator Guide.
- Plan _____.
- _____.
- _____.
- _____.



Preparing to Facilitate the Course

Teaching and Facilitating

For each of these categories, what are some of the ways facilitation is different than teaching?

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



Preparing to Facilitate the Course

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



Preparing to Facilitate the Course

Room Arrangement

Ask yourself these questions when you have the opportunity to determine the Room Set-Up:

- 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?



Preparing to Facilitate the Course

Using Planning Agendas



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.



Preparing to Facilitate the Course

Being Able to Prepare Quickly

How do other trainers practice?

-
-
-
-
-
-
-

How can I use the At-A-Glance document to quickly prepare?

-
-
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-
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-



Optimizing the Learning

Learning Objectives

In this segment, we will discuss:

- 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

Reading the Audience and Assessing Comprehension



Clues for Assessing Participants

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-
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-



Optimizing the Learning

Know Your Audience

What are some creative ways in which you can make the session interesting and relevant to participants?

-
-
-
-
-
-

Demonstrating Flexibility

What are some ways you can adjust the material or delivery when you are facilitating a session? What is the impact on the participants?

-
-
-
-
-
-



Optimizing the Learning

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

- 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.”

- 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.

“I’m running out of time.”

- 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.



Optimizing the Learning

Reviewing, Reinforcing, Recognition, and Reward



Take a minute to think about something you have learned recently (a sport, a game, or techniques related to work), and then ask yourself the following:

Did the learning require more than just absorbing new information? Can you describe the process?

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



Optimizing the Learning



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 _____ to learn.
- Learning that actually changes a person's behavior cannot occur unless the learner experiences a _____, such as purpose, anticipation, or excitement.
- Learning occurs on an individual basis, with individual _____ and individual _____.

Let's come up with some great examples!

- _____
- _____
- _____
- _____
- _____
- _____



Optimizing the Learning

Providing Next Steps

How can facilitators conduct and debrief action planning with impact?

-
-
-
-
-

How can you follow up with participants after class?

-
-
-
-
-



Managing Your Class

Learning Objectives

In this segment, we will discuss:

- Common challenging behaviors and methods of discouraging the behaviors
- Providing effective feedback
- Using breaks effectively

Dealing with Challenging Participants

Guidelines for Handling Participants' Behavioral Issues

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.



Managing Your Class

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.



Managing Your Class

Coping with Side Conversations

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.
- 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.



Notes



Managing Your Class

Providing Effective Feedback

What are the most important considerations to make when providing feedback to participants? Why? How does it make them feel?

- Be descriptive and _____



Notes



Managing Your Class

Using Breaks Effectively

Creative ways to can get participants to return from breaks

- **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.
- **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).



Managing Your Class

Making Yourself Appear Confident

I can use these techniques to make myself less nervous, and to appear more confident?

- Whenever you are feeling a little nervous, it's best to encourage _____ participation, so you're not doing it "on your own."
-
-
-
-
-
-
-



Managing Your Class



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.



Using Visual Aids

Learning Objectives

In this segment, we will discuss:

- The importance of visual aids
- Tips for designing and using various visual aids



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.



Using Visual Aids

Benefits of Using Visual Aids

Method of Instruction	Recall 3 Hours Later	Recall 3 Days Later
Telling when used alone		
Showing when used alone		
When a blend of telling and showing is used		

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



Using Visual Aids

Designing and Using Visual Aids

Basic Rules for Preparing Visual Aids

- 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.



Using Visual Aids

Using Flipcharts Effectively

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 Visual Aids

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 use 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 will not be heard.
- Use various bright colors for attention control.
- You may pre-plan your outline in pencil on the flipchart.



Using Visual Aids

Other Presentation Tips

Tips for Using Overheads Effectively:

- 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.

Tips for Using Videos Effectively:

- 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 Visual Aids

Tips for Using an LCD Effectively:

- 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.



Notes



Using Visual Aids

Facilitators Don't Have to Know Everything



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.



Notes



Effective Class Wrap-Up

Learning Objectives

In this segment, we will discuss:

- Why class evaluations are important to improving future classes
- Tips for ending a session

Evaluation

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

- 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.



Effective Class Wrap-Up



Tips for Ending a Session

- Conduct an Icebreaker or Session Starter to get participants engaged and energized.
- 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.



Course Closing and Follow-Up



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

Instructions:

1. Divide into groups of 4-6 members, and move your chairs into a circle.
2. Each person in the group will be given blank paper, envelopes, and a pencil.
3. Individually, create a **STRENGTHS LIST** – a list of 5 strengths you feel you have as a facilitator. Then, spend two minutes sharing your list with the rest of the group.
4. Next, you will create a **CHALLENGES LIST** – a list of 5 challenges you feel affect you as a facilitator. Again, spend two minutes sharing your list with the rest of the group.

STRENGTHS	CHALLENGES
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.



Course Closing and Follow-Up



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

Instructions:

5. Next, list the five steps you think you need to follow to achieve your goals as a facilitator. As well as list any factors (or barriers) which have prevented you from achieving these goals in the past.
6. As a group, review your lists, one at a time. The group as a whole should:
 - Discuss and map 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, capture these items on the action planning page in your Participant Workbooks.
7. Send the Action Plan to your RTMs.

List the five steps you need to take to achieve your goals as a facilitator.

- 1.
- 2.
- 3.
- 4.
- 5.



Course Closing and Follow-Up

Action Plan

The top three things I learned in this session are:

1. _____
2. _____
3. _____

Instructions: Use the space below to list your action plan steps to implement back at your office.

How will I implement the concepts learned in the session as I facilitate classes?

How will I implement the concepts learned in the session as I facilitate classes?



Additional Resources

Facilitation Preparation Checklist

Note: Some of these items may not apply to your session.

PREPARE the following:

- Flipcharts
- Classroom arrangements
- Television and video cassette recorder
- Visual aids

Ask yourself the following questions:

Facilitator Materials

- Did I check the database for the latest Facilitator Guide?
- Am I familiar with materials?
- Are my notes up to date?
- Have I practiced using my visual aids?
- Have I practiced and considered the timings for each lesson?
- Have I thought of ways in which I plan to handle each of the learning styles?
- Did I complete an At-A-Glance storyboard?
- Do I have the class evaluations?
- Do I have good discussion questions ready to facilitate the learning?
- Do I have personal experiences I might share that are related to the topics?
- Do I have a class roster?
- Do I know anything about these participants that might enable me to tailor the material?



Additional Resources

Participant Materials

- Am I familiar with materials?
- Did I cross reference and note page numbers that I want to refer participants?
- Do I have enough copies?
- Do I need handouts? Do I have them ready?
- Are there any other items I need to provide participants?

Equipment

- Do I know what equipment I will need?
- Do I have the equipment, and have I tested it?

Logistics

- Am I familiar with the room layout, building layout, local area?
- Have I determined if there is anything else that I can do to improve the comfort and usability of the room?

Other

- Do I have markers, colored pens, flipcharts, post-its, tape, or any other materials that I need?
- If guest speakers are part of the training, have I followed up with them?



Additional Resources

Facilitation Observation Checklist

For each of the following skills/topics, mark the chart with an “X” in the corresponding numbered column to indicate your assessment of the class you are observing. There is also some space to provide other notes and comments about the call at the bottom of the page. When complete, provide this Facilitation Observation Checklist to the facilitator.

Skill/Topic	Growth Opportunity							Strength		
	1	2	3	4	5	6	7	8	9	10
Establish Ground Rules and Set Expectations
Was Prepared to Facilitate
Appeared at Ease and Confident
Use of Prework
Establish Good Communication and Rapport
Room Arrangement
Kept People Engaged
Used Effective Presentation Skills
Checked for Comprehension
Recognized and Rewarded Participants
Demonstrated Flexibility
Reviewed and Reinforced Material
Used Breaks Effectively
Use of Visual Aids
Use of Activities
Class Evaluation



Additional Resources

List of Common Ground Rules

- Housekeeping items such as where the restrooms are, phones are, and other logistical items.
- Turn off cell phones and pagers.
- Be fully engaged and be prepared to participate.
- Come back from breaks on time.

Others:



Additional Resources



Activity Toolkit

Type of Activity:

- Opener* *Icebreaker* *Mixer*
 Retention *Closer* *Other* _____

Who introduced the activity?

What is the activity called?

How is the activity implemented? What are the instructions?

When can it be applied? In which class / for what topic would it be most powerful?

What learning styles are impacted with this activity?

What other tools can I tap into learn more about activity?



Additional Resources

Study Notes/Suggestions for Visual, Auditory and Kinesthetic Learners

Visual Style

- Use of highlighters
- Near memorization of chapter/notes
- Recopy notes in colors
- Visually organize or reorganize notes using columns, categories, outline forms, etc
- Remember where information was located in visual field
- Create timelines, models, charts, grids, etc.
- Write or rewrite facts, formulas, notes on wall hanging, bedsheet, large poster for visual review at any time
- Facts, formulas, notes in index cards arranged and rearranged on wall, bulletin board, floor, bed
- Use of color-coded markers or cards for previous two above
- Use of visual mnemonics
- Video supplements important for understanding or remembering
- Use of "background" visual activity helps you to concentrate

Auditory Style

- Prefer to listen without taking notes
- Prefer group discussion and/or study groups
- Need to discuss concepts/facts/aspects with friend immediately after new learning
- Frequently does homework with friend(s) via telephone - seems to understand better and retain more
- Tape records lesson or notes for re-listening later
- Must say facts/formulas/information over and over to retain
- Simultaneous talking-walking studying
- Set information to rhyme, rhythm, or music to aid retention



Additional Resources

- Aural Mnemonics
- Remember where information was located in auditory field (frequently tagged to "who said that?")
- Use of different voices to study (like creating a script, or acting out a play)
TV/video/radio supplements useful for obtaining information
- Use of background music helps you to concentrate
- Prefer quiet study environment

Kinesthetic Style

- Copy notes over and over, apparently to make them neat or organized
- Must use white-out or start new page after several mistakes
- Prefers to take notes during lesson as an aid to concentration
- Must take notes, even when detailed outline is distributed
- Doodles while studying
- Must move about when studying
- Alternates sitting still and moving during homework/studying
- Simultaneous talking-walking, talking-exercising study, or walking-reading study
- Sometimes does all of previous two in one study session
- Move hands or feet for rhythm emphasis while studying
- Make charts, grids, timelines, diagrams (usually several times)
- Trace key words with finger, marker, hand
- Re-enact situations while studying
- Constructs things while studying (house of cards, blocks, etc.)
- Prefers learning by doing
- Frequently takes things apart, or "tinkers with things" for understanding
- Prefers on-site visits for understanding



Additional Resources

Appealing to Learners with Different Intake Styles

For learners with auditory learning preferences:

- Make eye contact.
- Slow down your speech.
- Keep control of your body language (hold your arms and hands quietly at your side or under the table).
- Resist the urge to draw or write.
- Pause.
- Resist the urge to interrupt.

For learners with visual learning preferences:

- Add visual words to describe what things look like.
- Draw pictures to illustrate your points.
- Bring color brochures or color workbooks.
- Write things down for the learners.
- Consider creating charts.
- Prepare a formal presentation.
- Practice doodling while others speak; learn to draw.

For learners with more kinesthetic preferences:

- Ask your kinesthetic learner to talk.
- Talk quickly and with your hands.
- Interrupt to move faster.
- Give them something to take with them (toys and laminated cards are great).
- Don't turn the lights out for a presentation.
- Ask about and talk about emotions.



Additional Resources

Power Tips



- When you call on people, use alternative ways such as: by name, by state, by their region, by their manager, by their area code.
- Randomly call upon participants by name, and make sure everyone has an opportunity to participate.
- When asking participants to contribute to an agenda, try to cover the topic during the session. If the topic is not covered, let the participant know at the end of the session that you have not forgotten, and you will be contacting them with the information.
- As you facilitate the discussion, make sure any contribution is acknowledged in a positive way.
- Always give participants sufficient time to respond to questions.
- Try to present ideas in a discussion format. Let participants come up with the ideas as you direct and guide them.
- Have a watch or clock on hand so you can time the activities. A minute or two of silence may feel longer than it is unless you keep track by watching the time. Always state and allow for the allocated time for activities.
- Use the Parking Lot to capture ideas and topics which are not the direct focus of the training, and how we will come back at a later time to address them.
- 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.



Additional Resources

Evaluation

We want your feedback! Please let us know what your thoughts are in regard to this program by completing this evaluation.

Course Content Outstanding.....Poor

Organization of materials	4	3	2	1
Value of interaction	4	3	2	1
Value of activities	4	3	2	1

Trainer’s Effectiveness

Ability to hold your interest	4	3	2	1
Expertise on the topic	4	3	2	1
Effective response to questions	4	3	2	1
Presentation of materials	4	3	2	1
Use of Visual	4	3	2	1

Logistics

Classroom setup	4	3	2	1
-----------------	---	---	---	---

Overall

I now understand how to apply the material presented.	4	3	2	1
---	---	---	---	---

How can we improve this training?