



Motivate, Educate, Facilitate

Facilitation Skills Training Guidebook

 **POWER
PRESENTATIONS**
A TOP Mastery® Product

Table of Contents

How Adults Learn.....	2
Train vs. Teach vs. Facilitate.....	6
Icebreakers.....	10
Qualities of an Outstanding Facilitator.....	18
Types of Questions	22
Active Listening.....	28
Facilitation Activities.....	32
Managing Challenging Behavior.....	40
Room Set Up.....	60

How Adults Learn



How Adults Learn: Neural Networks

Attention:

Attention requires focused concentration and is a prerequisite for neurons to be activated and neural networks to be forged. Forging new networks is energy-intensive and our brains are not designed to remain attentive for long periods of time. The brain needs downtime at regular intervals to rest and refocus. During this time, it is also strengthening the newly-formed connections. When we push ourselves to focus beyond our natural limits, our concentration wanes, which is our brain's way of forcing a break - and we catch ourselves daydreaming.

Memory

Memory is typically described as a three-part process of encoding, storage, and retrieval. Incoming data is held in short term, or working, memory and will be quickly lost if not consolidated. How well we encode a memory is critical to how effectively we will be able to recall it at a future point. Failure to learn can be a function of shortcomings at any of the three stages in the memory process.

Functional magnetic resonance imaging (fMRI) studies show the important role of the neurotransmitter, dopamine, in the learning process. Dopamine is the brain's chemical reward and is triggered in response to positive feedback during the learning process. This dopamine reward mechanism serves to reinforce the neural connections in the associated network, strengthening it with each repetition of the thought or behavior that caused it. This is the biological process that embeds learning.

Use it or Lose it

Like the muscles in our body, the 'use it or lose it' principle also applies to our brain cells. Continual stimulation of neural pathways keeps them healthy and active, but connections weaken and recede through lack of activation. To guard against this, continual mental stimulation, or learning, is essential.

How Adults Learn: Conditions for Learning

Physical:

The brain draws approximately 20% of the body's available energy and increased mental demands draw more oxygenated blood into the brain as neurons need fuel to fire. Dehydration and low glucose levels drain the body and the brain of its functional necessities and, in turn, inhibit the learning process.

Cognitive:

Adult learning, in particular, requires that we channel our available resources to meet all the learning demands in our environment. We have any number of concurrent projects related to family, work or career, leisure activities, and spiritual interests, all of which require the continual integration of new information, people, processes and other demands.

All these activities compete for our available cognitive capacity, so personal motivation and commitment are hallmarks of effective adult learning.

Emotional:

Amygdala activation during the encoding of a new memory enhances its subsequent retrieval. This means that emotional cues linked to learning content forge a deeper and richer neural pathway than fact-based content alone. Emotion regulates where we place our attention, and therefore is essential to recruiting the neural networks on which we build our knowledge.

Collaboration:

Learning communities reinforce learning outcomes, increase motivation and challenge, and generate more diverse solutions than individuals operating alone.

Train vs. Teach vs. Facilitate



Train vs. Teach vs. Facilitate



The concept of **training** means that we are providing direct instructions on how to complete a task. It is usually for a specific skill set with a narrow focus and is provided in a short period of time.



When we are **teaching** something the goal is to impart a deeper, more complex knowledge about a subject. We are providing the background and research related to this topic.



Facilitation is a tool that a trainer will use at different times throughout a training course to direct and guide discussions. Through facilitation, a trainer can allow everyone a chance to speak their mind, and feel part of the group.

Train vs. Teach vs. Facilitate

Train	Teach	Facilitate
Specific skills Narrow focus Short time frame	Deeper knowledge Study behind it	Tool used by trainers to direct and guide discussion Everyone should speak their mind

Example:

Train	Teach	Facilitate
Give a step-by-step guide to conducting good eye contact	Explain what good eye contact is Explain how good eye contact will help when presenting	Ask for group feedback after the skill is taught

Icebreakers



Icebreakers

Icebreaker activities allow learners to get to know each other. They also help build emotional support and community.

Challenges and objectives

Divide the class into small teams. Instruct teams to identify their challenges for the topic and their objectives for the training. Post the work on flip charts. Have them introduce their team and share their work with the rest of the class.

Mistaken identity

At the beginning of the class, ask participants to give you their name tags. Before class begins, randomly distribute name tags to participants. Have participants circulate around the room, find those with their name tags and make a switch. Once they switch, have them share their professional history with the person who had their name tag.

Find someone who...

Using a list that you copy and distribute, participants find others who have particular characteristics. The participant or participants who get the largest number of completed rows on the table win prizes. See page 16 for more details.

Icebreakers

Allow me to present...

Participants interview each other briefly and then introduce each other to the larger group—for small groups of 15 or fewer. See page 17 for more details.

What if...

Hand out colored candy to participants. Participants answer questions according to the color of the candy. See page 17 for more details.

Adjective/name

Ask each participant to think of an adjective that starts with the same letter as their first names and introduce themselves as “adjective name” such as “Fantastic Frank” or “Caring Chrissy.” When they introduce themselves to the class, have them explain why the name fits.

Icebreakers

Learning from experience

Have participants introduce themselves and explain one thing they have learned the hard way about the topic you are covering. Post their “lessons learned” on a flip chart and refer to them throughout the class, when appropriate.

First job

Have participants introduce themselves, sharing their name and something they learned on their first paying job.

Questions

Have each person write a question they want to be answered in the training on a Post-it (sticky) note or piece of paper. Have them introduce themselves and state their question. Then post all questions on a wall chart. During or at the end of the training, ask the group to answer the questions

I'm unique

Ask each person to share one thing that makes him or her unique.

Your Notes:

Find someone who...

Ask others in your group if they meet any of the descriptions listed in the “Characteristic” column. Once you find someone write down the person’s name, find out more and record his or her answer. Try to find as many people as possible who meet the descriptions and you may win a prize!

Characteristic	Person	Find out	Answer
Has appeared on stage		What role the person played	
Has or had unusual pet (not cat or dog)		Type of pet (s) and name (s)	
Likes to do adventurous things		One adventurous thing they did	
Has met someone famous		Whom did they meet and how?	
Currently plays a musical instrument		What instrument?	
Has been to one of the seven wonders of the world?		Which one?	

Allow me to present...

Pair off the participants and have them interview one another. You can add interest by asking pairs to find something unusual that they have in common. Then have the participants introduce each other to the group. Interviews should be no longer than five minutes.

What if...

Pass around a bag or bags of small colored candy and tell the participants to take some to eat and one to place aside. Write the following list of colors and corresponding statements on a flip chart page. Ask participants to state their names and complete one of the following statements, based on the color of their remaining candy.

Colors	Statements
Red	If I could go back in time, I'd...
Blue	If I had an alternative career, it would be...
Green	If I could live anywhere...
Yellow	If I could meet a famous person, living or dead, it would be...
Brown	If I received an unexpected gift of a thousand dollars...

Qualities of an Outstanding Facilitator



The Three Silos of an Outstanding Facilitator

1. Know Your Content	2. Delivery Skills	3. Manage People
		

Qualities and Roles of an Outstanding Facilitator: Proper Mindset

Qualities:

1. Values collaboration
2. Create sense of trust and safety
3. Understands the audience
4. Likeable
5. Understands: No bad questions
6. Flexible
7. Curious
8. Believes in power of the group
9. Keeps conversation moving
10. Active listener
11. Good sense of humor
12. Inclusive: Involves everyone
13. Inquisitive
14. Not defensive
15. Encouraging
16. Keeps group enthused and engaged
17. Asks good questions

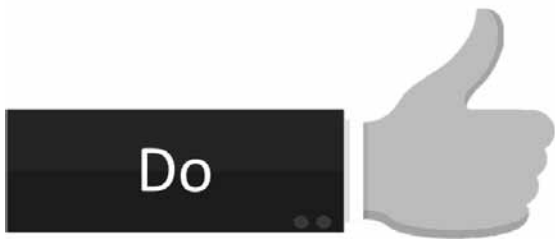
Roles:

1. Traffic cop
2. Judge
3. Navigator
4. Recorder
5. Questioner
6. Audiovisual technician
7. Role model
8. Motivator
9. Counselor
10. Mediator
11. Evaluator
12. Host or Hostess

Types of Questions



Questioning Do's and Don'ts



Plan when and where you will ask questions

Start with easy questions

Be patient. Give the audience time to answer

Repeat the answer

Distribute your questions equally throughout the audience

Call on participants by name, but use caution so as not to make someone uncomfortable

Ask follow-up questions



Questioning Do's and Don'ts

Don't



- Provide your own answer to a question
- Interrupt the person speaking
- Keep asking questions to the same people
- Ask a question everyone knows the answer to
- Get defensive



Types of Questions

Open Questions

Open questions invite responses and interpretations from participants. This type of questioning encourages dialogue by prompting opinions. In addition, open questions often prompt follow-up questions for clarification purposes.

Closed Questions

A closed question is used to verify information or check specific details. They often lead to yes or no answers and are not useful for facilitating discussion.

Clarification Questions

Ask the participant to clarify the statement they made, or question they posed, in order to ensure correct understanding. For example, "Could you help me understand the process you mentioned?"

Validation Questions:

By asking validating questions, you are repeating and rephrasing what the participant said to validate you have understood their meaning. "What I am hearing you say is that the process will take thirty days and cost one thousand dollars, correct?"

Priority Questions:

Asking the audience what they think is most important.

Types of Questions

Diagnostic Questions

Diagnostic questions are used to interpret and explain how the information impacts you or the participants.

Extension Questions

These types of questions prod the audience to explore the issues in greater depth. For example, ask, "What else should we consider?"

Combination Questions

Combination questions ask how different pieces of information relate. These questions can be used after new information is acquired, to understand how it will affect previously known information. "How would you understand X in light of Y?"

Ask for Information

Although basic questions like "Where," "When," "Who," and "What," information questions help establish the key points.

Challenge Questions

Challenge questions address how to make a new concept or idea successful.

Active Listening



Active Listening: What it Means

When you listen actively, you intentionally focus on who is speaking. Block out all other distractions. Square up your body and focus only on the speaker. Listen with both your ears and your eyes. Watch their body language and tune into all the things happening with that individual.

Active listening does not mean that you agree with the speaker, it means that you understand their point. Set aside your own prejudices, opinions, and judgments. You are there to manage the discussion, not control it. Agreement is not necessary. Focus on the needs of the speaker and listen from their perspective, not your own. Imagine that you are walking in their shoes.




Active Listening: Techniques

When there is a discussion, agreement or disagreement going on in the room, it's okay to let it run its course. You do not need to respond to them, but you do need to understand them. Do not feel the need to react, just understand.

After they have spoken, give the speaker some time and space for rest. If appropriate, you can express appreciation for their comments, then restate or summarize their key points to affirm you understand and help synthesize their comments. You should be able to repeat back, in your own words, what they said. You may either state your interpretation or ask deeper questions.

If needed, ask non-threatening questions based on the key points of the previous comment to enhance understanding. Ask the question of either the person talking or others in the group. Your goal is to get them to give more information on this topic. If you feel you need others to be involved, then pose questions to the audience to get their ideas and opinions.



Facilitation Activities



Facilitation Activities

Activity	Description
Card sort	Give each learner an index card with the name of a drug and four things the drug does or doesn't do. Learners select the incorrect statements.
Teach back	Assign each learner a topic to teach back to the group (i.e. Four symptoms of a migraine).
Information Search	Create questions where answers can be found in resource materials. Learners race to see who can find it first. The person who finds the answer fastest wins a prize.

Facilitation Activities

Activity	Description
Bingo	Make cards with up to nine topics you'll cover (order each card differently). Learners check off as you cover topics and yell Bingo when they complete a row to win.
In the news	Instruct learners to find articles, editorials, other studies or related products that aren't part of the teaching. They will share findings and discuss how their product aligns with what they've discovered.
Learning contract	Assign topics to each participant. They research it and teach back to group.

Facilitation Activities

Activity	Description
Fill in the blanks	Post a slide or flip chart with a chart or diagram. Fill in some sections and leave other sections open. Have them go through filling in the blanks.
Push-back Questions	Pose questions to learners that doctors would be likely to ask and have them respond. What would you say? What would you do?
Active role plays	One person plays the doctor, one is the nurse, one is the sales representative. Set up so they're either accepting, challenging, etc.

Facilitation Activities

Activity	Description
Game show	Ask a question, give learners buzzers and provide prizes
What's wrong?	Describe qualities or aspects of a drug, then have learners write down what's incorrect.
Ball toss	The person with the ball states one thing they learned then tosses the ball to the next person. Repeat.

End of Day Activities

Wrap-up questions

At the end of the session, the facilitator asks one question and everyone in the room gets 30 seconds to respond.

Example Questions:

What is one thing you learned today that you will implement tomorrow?

What is one thing that surprised you about what you learned today?

What skill or activity did you originally feel resistance toward, but then changed your mind about later in the day?

Individual assignment

Give an individual assignment. The deadline for completion depends on your scenario. It could be something they prepare for the next session or day, or it could be something they have to give to the instructor.

Partner activity

Pair up participants to complete an assignment. Predetermine the dates and times for them to meet, preferably scheduling this meeting when participants sign up.



Your Notes:

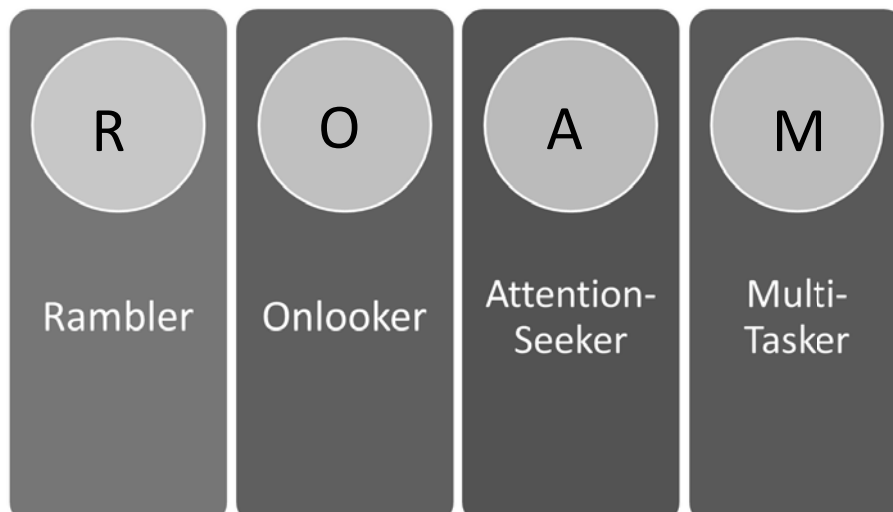
Managing Challenging Behavior



Managing Challenging Behavior

Instructions:

Work with others in your group to identify ways to handle the type of challenging participant behavior assigned by your facilitator. Develop both proactive strategies (setting boundaries and limits of expected behavior up front and reinforcing them at intervals) and reactive strategies (managing behavior as it occurs or quickly thereafter). Record your ideas to share with the group.



Managing Challenging Behavior: Descriptions

Rambler: Person who keeps talking in circles around the topic or might include information irrelevant to the topic. Eventually rambler makes their point, but it takes a while to get there. Sometimes the information is jumbled or out of order. Ramblers try to figure things out by talking out loud and learning on the fly. They want others to help them figure it out, and are often confused and looking for validation that they are on the right track.

Onlooker: Silent observer. Sometimes they're disengaged and don't care, and other times they need to take the information in and absorb and process before they engage. Don't confuse silence with being uninterested. This is how they learn.

Attention Seeker:

Likes to be known as the expert. They believe it is important for their voice to be heard, and they want others to see them as an expert. They tend to be more social, and more dominant. They like to verbalize their learning and hear themselves speak it as part of the learning process. They want others to know they're understanding. They feel they're helping others in the room to learn it by talking. Not always negative.

Multi-tasker:

Someone who e-mails, checks their phones, has side conversations, or reads ahead in the materials. They do this because they are bored, or they're stressed or they have some pressing deadlines. This is the most challenging person in the class because they typically don't want to be there. They don't feel the curriculum has value for them. They don't feel a sense of urgency. If it's stress or deadlines, typically those people will come up and tell you. If they don't, then you know they're bored.

Ramblers

Bob has trouble getting to the point when sharing a story, answering a question or giving an example. Janet frequently gets off topic in class discussions, either by answering questions with much more information than needed or asking unrelated questions.

What would you do to address the problem? List your recommendations below.

Proactive strategies:

Ramblers

Reactive strategies:

Ramblers

Proactive strategies:

Sometimes the rambler just needs to speak out loud in order to learn or grasp concepts. Make sure you give them the opportunity to talk about what they are learning or what they know. They will sometimes need to figure things out verbally. This is why it is effective to engage them during breaks and lunch and let them share their knowledge or ask how they feel about the new information.

Prior to any training or open discussion, set or review the ground rules for the entire group. Express that you want to encourage open discussion and sharing of opinions, but as the leader, you may at times need to redirect the group. Explain to them that they should not take it personally, but rather ask them to please respect the need to keep things moving and on time.

It sometimes helps to state up front that you will allocate 15 minutes for a particular discussion or topic. This enables the room be aware of spending too much time on a topic. This also gives you the opportunity to stop the discussion after 15 minutes and determine if you need to move them along or if you should allocate more time to this topic.

Recording ideas on a parking lot allows you to show respect to the rambler, but also keep things moving. Let the group know that if there is time near the end of the meeting you will circle back to a topic. In some cases you may choose to follow-up with this person one-on-one to discuss or arrange another meeting with the entire group.

Ramblers

Reactive strategies:

The rambler will take the roundabout way to make their point, therefore you need to listen carefully and mentally note their key points. When this individual concludes or is struggling, you can restate or rephrase back to them what you heard. Sometimes you will ask for validation from this person to help the room understand what they meant; Other times you will turn to the audience and ask for their opinion.

You could consider using the phrase, “ Lets take this discussion offline...” However, I recommend you do this only one time. If you use it more than once, the room thinks you are avoiding the issue they want to discuss.

Asking closed-ended questions is another great way to stop the on-going dialog. Once they answer with a yes or no, you can divert another question to another section of them room to get others involved.

Onlookers

Eric pays attention and looks interested but does not respond to questions directed to the group or contribute content or ideas to the discussion.

What would you do to address the problem? List your recommendations below.

Proactive strategies:

Onlookers

Reactive strategies:

Onlookers

Proactive strategies:

Ice breakers are great ways to get everyone in the room involved. When people are more connected, they are more willing to contribute.

When you notice a person sitting back, give them an active role such as being a spokesperson for the group. This will naturally allow them to speak out and be seen. This will also eliminate the need to single them out, as many times they do not appreciate being called on too early in the learning process.

Engaging an onlooker on break or at lunch is an easy way to understand how they are feeling about the new information. Someone who sits back and watches the action is more willing to share their insights privately.

Many times onlookers will do better sharing their thoughts with one or two people.

Onlookers

Reactive strategies:

Ask them a simple question early on. This gives them the ability to contribute without the fear of being right or wrong.

During an exercise or group activity sit next to them and engage them.

Once the day is underway, create activities to help draw the onlookers out by allowing them to share their opinion. It's best to connect with this person early and know what they are thinking. Then you can ask a question that will allow them to share what you already know.

If you observe more than one onlooker in the group, you may change up a discussion from being an open discussion to teaming two people together to discuss what they think. When this happens the room gets loud and can re-energize someone who is not paying attention or not getting involved.

Attention Seekers

Katie talks a lot and engages in side conversations with those around her. Olivia often interrupts others, including you with her comments. Doug takes control of discussions so that others are participating less than they were.

What would you do to address the problem? List your recommendations below

Proactive strategies:

Attention Seekers

Reactive strategies:

Attention Seekers

Proactive strategies:

Before getting into a topic or discussion, revisit what the original ground rules were for the day as a gentle reminder to all, but specifically for the person you anticipate will want to have their opinions heard.

Make sure you have established goals for the day or meeting and, if possible, post them on a flip chart. This helps the individuals that are attention seekers to stand down on their own.

If you are running behind schedule or feel a discussion could go sideways, put a time limit on the front end of the discussion. Even posting the time on the board will allow you to manage the room or person without it being personal.

You typically know who the attention seekers are, so it's best to talk to them before you introduce a topic that you feel they will want to dominate. Pull them aside and compliment them, tell them you acknowledge their expertise and value their knowledge. Share that you are concerned this discussion could be long or go south and ask them for their help in keeping things moving.

Attention Seekers

Reactive strategies:

You can record their ideas on the parking lot, but keep in mind, attention seekers do not like this. They will challenge you on the spot and want to continue to talk about it. Before using the parking lot, try to get the room on your side by asking them if they feel this should be addressed now or if it can wait. The more you get others involved, the easier it is for you to move on.

Many times the leader and the attention seeker can get into a bit of a power-play. Don't go there! If someone is talking too often, then ask others to provide clarification to this person's point.

You can do this by asking others to chime in with their thoughts and ideas. It's always best to engage the room rather than going toe-to-toe with this person. Strength in numbers!

Of course, you can always ask more questions to the other experts in the room. Make sure if you ask another question that you pick someone in a position of power equal to that of the attention seeker. They are less likely to interrupt someone of the same or higher level.

The fall back strategy is to talk to the attention seeker on the break. By this point you have lost the battle, but at least you can stop the bleeding! Your best option is to be proactive and talk to them before this happens!

Multi-taskers

Susan generally ignores what is going on, frequently checking her phone for texts and missed calls and sending messages.

Proactive strategies:

Multi-taskers

Reactive strategies:

Multi-taskers

Proactive strategies:

Make sure you plan activities and ice breakers that require people to work with each other.

In your ground rules, you will want to state what is considered proper conduct when it comes to the use of phones and computers.

You will want to commit to providing breaks often and designate periods of time for lunch and breaks. This will help those that are feeling pressure to meet other deadlines or work on other projects.

If you notice someone running out or constantly looking at their phones, go up to them on a break and ask them if you can help them out. Many times they just need 15 minutes to handle something. Give it to them! They will be able to come back and focus and you will not be distracted by their texting!

If they person really needs to handle something you will want to get them out of your room. Have them handle their issue outside of the classroom. It is not fair to let one person do emails and not the others.

Low energy in the room could mean you are boring. Increase your volume, pick up the pace and have some fun. If appropriate you can include toys, contests and candy throughout the day to liven up the room.

Throughout the day you will want to make sure you are repeating why this training is good for them. You may even have an exercise where they state why this training will be beneficial for them and post it on the wall. When people understand the value, they are more motivated to learn.

Multi-taskers

Reactive strategies:

When you notice somebody not paying attention or talking to somebody else, the easiest and quickest way to non-verbally get them back with you is by holding your eye contact on the individual until they look up. Walk closer to them and keep staring at them till they look up. When they do, give them a small smile. This little smile is your way of saying to them, "I am paying attention to you so please... I ask that you pay attention to me!"

Physically stand closer to them while you are presenting. They will feel your presence and stop what they are doing and pay attention.

You could ask them a question, however be careful here. If you choose to do this, first call on them and get their attention and then ask the question. You are not trying to embarrass them, you are just trying to refocus them.

Move the room around. Separate the buddies!

If you notice two people talking and they are senior to most others in the room, then it may be time to take a break and let them finish what they need to finish. You may even ask them if they need something or if they want to contribute something. Typically they will apologize and pay closer attention after the break.

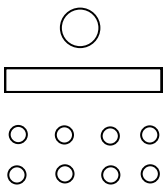
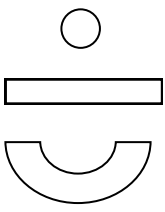
If you feel comfortable you may call out the two who are talking and ask them to contribute. Many times they are having a good lively discussion that would be good to share. Other times they will just apologize. Although this may feel a bit aggressive, it is important for others in the room to see you managing the room.

Room Set Up

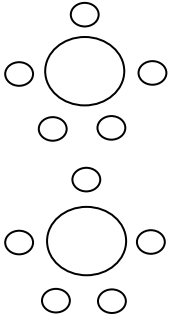


Classroom set-up

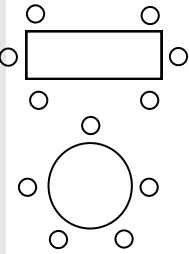
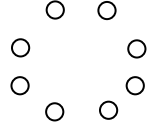
The room arrangement affects the classroom dynamic and sets the atmosphere. It may also affect participant attitudes and the learning process. Below are common arrangements with descriptions about how each affects learning.

Seating arrangement	Diagram	Program leader style	Learning philosophy	Classroom atmosphere	Potential trainee attitudes	Effect on learning process
Lecture hall or classroom style		<p>Authoritarian</p> <p>Trainee participation is secondary</p>	<p>Funnel theory: "Just pour it on and they'll get it"</p> <p>Emphasis on one-way communication</p>	<p>Business-like, cold, uninviting, formal</p>	<p>"You're in charge"</p> <p>"You tell me what to do"</p>	<p>Minimal trainee involvement causes learning difficulties</p>
"V" or "U" with trainer at the open end		<p>The emphasis is on trainer control</p> <p>Some participation</p>	<p>Trainer is the primary font of knowledge, but trainees can also learn from one another</p>	<p>Mostly trainer centered and formal</p>	<p>"Trainer in charge, but we'll have a chance to discuss with one another"</p>	<p>Reasonable learner involvement is possible</p>

Classroom set-up

Seating arrangement	Diagram	Program leader style	Learning philosophy	Classroom atmosphere	Potential trainee attitudes	Effect on learning process
Several small tables		<p>Highly participative</p> <p>Trainer is more a resource and catalyst</p>	<p>Small-group work (peer learning), providing high involvement, is fundamental to learning</p>	<p>Informal</p> <p>Casual and relaxed</p> <p>Trainee-centered</p>	<p>“Everyone is here to learn”</p> <p>“Trainer expects us to be very involved”</p>	<p>The trainer is a facilitator because learners have to discuss, explore, criticize, share, problem solve together.</p>

Classroom set-up

Seating arrangement	Diagram	Program leader style	Learning philosophy	Classroom atmosphere	Potential trainee attitudes	Effect on learning process
One large round or square table		<p>Participative</p> <p>Trainer communicates he or she is one of the group</p>	<p>Group learning is a positive experience.</p> <p>Everyone has something of value to add</p>	<p>Potential for informality</p> <p>Table somewhat inhibits communication</p> <p>Free exchange</p>	<p>“Trainer does not have a monopoly on wisdom”</p> <p>“We can learn from one another”</p>	<p>Opportunity for involvement by all leads to high level of learning</p>
Circle with no table		<p>Completely participative</p> <p>Trainer is a group member</p>	<p>Learning depends on involvement and peer relations</p> <p>Trainer is here to learn also</p>	<p>Warm, friendly</p> <p>Open, relaxed</p>	<p>“We will learn from each other”</p> <p>“We all have something to contribute”</p>	<p>Each person can be fully involved</p>

Your Notes:

Bibliography

Silberman, Melvin, L. *101 Ways to Make Training Active*. New York: Wiley, 2005.

Vorhauser-Smith, Sylvia. *The Neuroscience of Learning & Development*. Pageup People Whitepaper, 2012.



Motivate, Educate, Facilitate
Facilitation Skills Training Guidebook
A TOP Mastery® Product