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FACILITATION SKILLS TRAINING

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FACILITATION SKILLS TRAINING

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FACILITATION SKILLS TRAINING COURSE OBJECTIVES

General Objective of the Course:

Provide some training design and delivery skills to ERSRI staff to enhance their capacity to deliver economic training.

Specific Objectives:

At the end of the session, participants will be in capacity to:

1. Describe the 8 design components of an Experiential Learning Cycle.
2. Define and discuss ways to use facilitation skills to:
 - Conduct effective interactive meetings and sessions,
 - Elicit participation when delivering interactive presentations/lecturettes,
 - Generate interaction among participants,
 - Guide learners through an experiential session.

FACILITATIONS SKILLS TRAINING AGENDA

January 24 9:00 to 1:00 p.m.	January 25 9:00 to 1:00 p.m..
<p>Welcome & Getting Started</p> <p>Course Objectives, Schedule & Guidelines</p> <p>8 Design Components of an Experiential session</p> <p>Applying the 8 components of an Experiential Module to a training session</p> <p>Facilitation Skills</p> <p>Practice Preparation</p>	<p>Practice</p> <p>Feedback and learning from practice</p> <p>Application Planning</p> <p>Evaluation</p> <p>Closing</p>

EFFECTIVE ADULT LEARNING

- Makes explicit links between real world and content.
- Is participatory – provides opportunities to share or contribute ideas.
- Includes practice in the use of skills or of frameworks.
- Integrates and makes links between sessions/topics.
- Uses a mix of methodologies.
- Matches method to content in ways appropriate for the learning you are trying to achieve.
- Challenges participants to be analytical.
- Helps participants identify the relevance/importance/applicability to their work.
- Balances individual and group context for learning.
- Supports theoretical frameworks with concrete examples.
- Provides materials/resources that eliminate obstacles to learning.

DESIGN COMPONENTS OF AN EXPERIENTIAL SESSION

1. Climate Setting

Stimulates interest, curiosity, induces participants to begin thinking about the subject at hand. Provides a basis for the presentation of session objectives by drawing out reasons for the need to explore the subject and how it will be useful to them. It also produces valuable data about the participants' experiences or viewpoints on a given subject, generating examples to which the trainer can refer during the rest of the session:

- Greet people as appropriate, putting people at ease.
- Ask questions related to the subject, and particularly to participants' experiences related to the subject.
- Link this training session to previous ones and place it into the overall framework of the workshop.

2. Objective Clarification

Presents to the participants statements that describe the intent, aim or purpose of the training activity. "Sells" the session to participants by linking to points discussed in the climate setting activity and in pre-course needs assessment conversations so that they see the relevance to their work or other real-life situation. Provides opportunity for participants to seek clarity on objectives, add additional issues or raise concerns:

- Write legibly, explain clearly with a rationale, and keep in view during the entire session.
- State in the objectives what the learner will be able to do or say using action verbs and make sure they are measurable, realistic and time-bound.

3. Interactive Presentation

Provides a framework, either a theory or a model, which becomes a basis for the experience that follows:

- Make a short, concise presentation centered around a few key points using examples to which participants can relate, ending with a summary.
- Pose questions to the group.
- Supplement the presentation with visual aids and handouts.

4. Experience

Provides opportunities for participants to "experience" a situation that simulates a real life situation. It is aligned with the objectives of the training session and usually builds on the interactive presentation. This "experience" becomes the data producing event from which participants can extract and analyze as they complete the learning cycle:

- Use "experiences" such as case study, critical incident, skit/drama, role play, skill practice, demonstration, small group task, team challenge, site/field visit, exercise, simulation, paper and pencil instrument, etc.
- Structure the experience with a road map that follows an appropriate delivery sequence.
- Give clear task instructions, related to the objectives of the session, which will guide the processing phase.

5. Processing

Causes participants to reflect on the experience, to think critically about it, and to share their reactions in a structured way with the whole group. It usually starts by looking at the task given for the experience, focusing on the content, the result. Then it continues with the comparing and contrasting of different approaches or ideas, guided by carefully prepared questions. It is also a time to help participants explore what happened when they tried to do the task, what was easy, difficult, and why. Finally it is also an opportunity to challenge participants to think about other ways they might have approached the task, and what the impact might have been on the result:

- Structure a report out discussion that focuses on the content.
- Lead a discussion in which the experience is analyzed and reflected on thoughtfully by the group.
- Help people share their individual experiences and reactions to the experience on an affective level.
- Challenge people to think of alternative approaches or results.
- Make a transition away from the experience so that participants are ready to generalize.

6. Generalizing

Extracts conclusions and generalizations derived from or stimulated by the previous phases of the cycle, linked to the objectives of the session. Helps participants step back from the experience and discussion, identifying patterns related to everyday life or to a theoretical construct.

- Ask open-ended questions that help participants think critically in order to draw generalizable conclusions.
- Help individuals summarize what they learned into concise statements.
- “Push back” to help make their thinking more rigorous.
- Record responses both to generate further discussion and to give people material they can use in application planning.

7. Applying

Draws upon insights and conclusions they have reached during the previous phases to incorporate into their lives for more effective behavior in the future:

- Ask questions that encourage participants to place themselves in their everyday life situations and identify what they will do better/differently as a result of what they have learned.
- Help people establish a time line for their application plan and identify people who can help support and monitor their progress.

8. Closure

Briefly summarizes the events of the training session. Links back to objectives and seeks to determine if they have been met. Wraps up training session and gives a sense of completion. Links session to rest of program especially upcoming sessions:

- Summarize the main points and learning of the session.
- Review the objectives.
- Conclude, or provide a bridge to the next session.

EXAMPLES OF PROCESSING QUESTIONS:

- What are your observations about _____?
- Where did you have difficulties?
- What surprised you?
- What worked?
- What strategies were used?
- What were turning points?
- How does what you said relate to ... or differ from...?
- What would have been a different way of looking at _____?
- What are some similarities that you notice in what people have said?
- What were your reactions?
- How did you feel about?

SOME SAMPLE GENERALIZATION QUESTIONS

- What have you learned about...?
- What conclusions about _____ can we draw from this?
- What general advice could we give about _____?
- What principles can we develop from this?

- What are some significant points to remember from this section of the course On _____?
- From this session, the readings and the discussions we have had all week, what insights do you now have about _____?
- If you were to synthesize all that we have been addressing in this unit, what would you say are the two most important conclusions you have reached about _____?

SOME SAMPLE APPLICATION QUESTIONS

- How can you apply _____?
- How can you use _____?
- As a result of our work on _____, what will/can you now do differently when you return to your job?
- Identify at least three "ways" that you will/can become more effective at _____?
- What do you still need to work on during the rest of the course?
- What are some ways that you can change your approach at work?

Choose two things you will work on when you return to your job...identify how you will undertake these activities...how you will know if you are being successful at them (in whatever ways you are currently defining success).

PUTTING THE 8 COMPONENTS IN A 20 MIN. SESSION

You will have a chance to apply these skills designing a 20 minutes mini-training session for tomorrow. This is the first stage of preparation, you have 15 minutes:

Topic selected for the mini-training session?

I am co-training with:

The Eight Stages of this mini-training session are:

1. Set Learning Climate:
2. Clarify Objectives:
3. Interactive Presentation to set the session framework/rationale:
4. Provide an experience:

5. Process the experience:

6. Generalize:

7. Apply:

8. Close

FACILITATION SKILLS FOR TRAINERS ¹

By James A. McCaffery

Introduction

Facilitation skills are important for everyone, but are especially critical for trainers. Communication may appear to be simple, but it is one of the more complex things that human beings do. Many things can go wrong in this process. For example, we may send a message that we think is clear, while the person receiving it may not understand it in the way it was intended. Sometimes we have things on our mind, we are distracted and do not "hear" or listen very carefully.

Although the range of communication activities and the skills involved encompass most of human interchange, there are four very important facilitation skills that a trainer can learn or enhance in a relatively short time: question asking, summarizing, paraphrasing and encouraging. With continued practice one may become very adept in their use.

Question Asking

Question asking is a critical trainer skill. Questions can be asked in two ways □ as closed questions and as open-ended questions.

Closed Questions

Closed questions generally result in yes/no or other one-word answers. They should only be used when you want precise, short answers. Otherwise, they inhibit discussion. The closed question can be answered with one word.

Example:

Trainer: *Do you think that recommendation will work?*

Participant: *No.*

Open-ended Questions

The open-ended question requires elaboration. "Tell me what you liked about that recommendation" seeks information. "How? What? Why?" are words that begin open-ended questions.

Trainer: *What did you like about that recommendation?*

Participant: *I think it is a good strategy for resolving the issue, one that can be implemented without expending a lot of resources.*

Trainer: *What kinds of goals did the group set?*

Participant: *They set a wide range of goals. The first was...*

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Summarizing

The purpose of summarizing is to:

- Pull important ideas, facts, or data together.
- Establish a basis for further discussion or to make a transition.
- Review progress.
- Check for clarity; check for agreement.

By using summarizing in a conversation, you can encourage people to be more reflective about their positions as they listen for accuracy and emphasis.

Summarizing requires you to listen carefully, in order to organize and present information systematically. Summarized information ensures that everyone in the discussion is clear about what transpired in the just-completed portion of the discussion.

For example, a trainer may summarize to ensure that participants remember what has been said or to emphasize key points made during a group discussion. In these instances summarizing is very useful. Some starter phrases to help you begin a summary are:

- *There seem to be some key ideas expressed here...*
- *If I understand you, you feel this way about the situation...*
- *I think we agree on this decision. What we are saying is that we intend to....*

A real value of summarizing is that it gives you the opportunity to check for agreement. If people do not agree, it is better for you to know during the discussion than to find out later when a task is not completed or a deadline is missed. One of the most common complaints is that some participants think an agreement has been reached; yet things do not occur as planned afterwards. In many instances, that is because there was not really agreement during the discussion.

As an example of summarizing, assume that someone named Joan has talked for 3 or 4 minutes, and you summarize as follows:

Let me see if I have it straight, Joan. First, you say the work is boring, not carefully scheduled, and finally, you are concerned about the number of hours people are expected to work, correct?

As another example, the discussion has gone on for several minutes and you summarize as follows:

In talking about this issue, we have come up with three main points. . .

In summary, this communication skill is a deliberate effort on the part of a trainer to pull together the main points made by the person or persons involved in the discussion.

Paraphrasing

Paraphrasing is simply restating what the other person has said in your own words. The prefix para means along side, as in the word parallel.

The process of paraphrasing is very much like catching a ball and throwing one back; except the ball you throw back is your own and perhaps a bit different from the original ball. Nonetheless, it is still a ball. You can throw back the other person's ideas by using such beginning phrases as:

You are saying...

In other words...

I gather that...

If I understood what you are saying...

The best way to paraphrase is to listen very intently to what the other is saying. If, while the other person is talking, we worry about what we are going to say next or are making mental evaluations and critical comments, we are not likely to hear enough of the message to paraphrase it accurately.

It is helpful to paraphrase fairly often, so that you develop a habit of doing so. You can even interrupt to do so, since people generally don't mind interruptions that communicate understanding. For example, "Pardon my interruption, but let me see if I understand what you are saying..."

Example:

Participant: *It seems the basic problem is that some of the people don't know how to use the management information system,*

Trainer: *In other words, you see the problem as lack of know-how.*

Another example:

Participant: *I think the most important thing is to tell the staff member clearly and directly how he is contributing to the problem.*

Trainer: *So you are saying it's important to tell the staff member directly what kind of impact he is having on the problem.*

Encouraging

In order for the above facilitation skills to be successful they need to be supported by a number of other encouraging facilitation skills, some verbal, some non-verbal. The trainer, through facial expressions, body language, and comments, encourages the speaker to say more about the situation. Examples are:

- Nodding one's head.

- Picking up on the last word or two of someone else's sentence.
- Repeating a sentence, or part of a sentence.
- Asking someone to say more about that.
- Saying: "That's good -- who else has something to add?"
- Maintaining eye contact, open body position.
- Saying "Uh huh."

SUGGESTED OPEN-ENDED QUESTIONS - CLARIFYING AND EXPLORING

1. Background

- What led up to _____?
- What have you tried so far?
- How did it happen?
- What do you make of it all?

2. Identification of Problems

- What seems to be the trouble?
- What seems to be the main obstacle?
- What worries you the most about ?
- What do you consider the most troublesome part?

3. Example

- What examples can you give us?
- For instance?
- Like what?
- What is an illustration you can give us?

4. Description

- What was it like?
- Tell me about it.
- What happened?
- How might you describe it in your own words?

5. Appraisal

- How do you feel about it?
- How does it look to you?
- What do you make of it all?
- What do you think is best?

6. Clarification

- What if this doesn't make sense to you?
- What seems to confuse you?
- What do you mean by _____?
- What do you make of it all?

7. Alternatives

- What are the possibilities?
- If you had your choice what would you do?
- What are the possible solutions?
- What if you do and what if you don't?

8. Exploration

- How about going into that a little deeper?
- What are other angles you can think of?

9. Extension

- What more can you tell me about it?
- Anything else?
- What more you would like to discuss?
- What other ideas do you have about it?

10. Planning

- How could you improve the situation?
- What do you plan to do about it?
- What could you do in a case like this?
- What plans will you need to make?

11. Predictions and Outcomes

- How do you suppose it will all work out?
- Where will this lead?
- What if you do - or what if you don't?
- What are the chances of success?

12. Reasons

- Why do you suppose you feel this way?
- How do you account for this?
- What reasons have you come up with?
- What is the logical solution to this?

13. Failures, Preparation for

- What if it doesn't work out the way you wish?
- What if that doesn't work?
- And if that fails, what will you do?
- What are some alternatives?

14. Relation

- How does this fit in with your plans?
- How does this affect your work?
- How does this stack up with your picture of yourself?
- How do the two plans relate?

15. Evaluation

- In what way?
- How is this for you?
- According to your own standards, how does it look?
- How would you evaluate all of this?

PRESENTING CONTENT INTERACTIVELY MAKING INTERACTIVE PRESENTATIONS

Adults prefer short, concise presentations when acquiring new information or when learning a new theory or framework. Their prime listening time ranges from 10 to 20 minutes; therefore it is best to make the most out of that period of time, and that does not mean dumping as much information as possible in a few minutes. It means making a careful selection of what will truly add value from the learner's perspective and distilling the essence from the material in order to generate the greatest possible impact.

Adults have a need to interact quickly with new material in order to relate what they are learning to their life experiences; therefore, they appreciate the opportunity to respond to questions that help them draw on their experience. Furthermore, adults benefit greatly from listening to the responses of their fellow learners. They also want to hear examples to which they can relate, that help them make comparisons with their own situation and to begin visualizing and internalizing the material. In order to absorb and retain information, adults need to see the material summarized in a way that is clear, simple, brief, and attractively presented.

These needs present challenges to trainers, who are often confronted with the pressure of conveying a large amount of information in a short period of time. There always seems to be too much and the decisions are not easy about what to present and how.

What you need to think about as you prepare your presentation

1. Determine how the presentation fits with overall session objectives:
 - Why the presentation is important to this group of participants.
 - How it builds toward the experiential activity that follows.
 - The learners level and experience with the subject matter.
2. Organize the content and structure the presentation:
 - Identify the key points of the presentation.
 - Decide what visual aids you plan to use and how to present them.
 - Devise a plan for starting the presentation.
 - Choose examples that will enrich the content.
 - Prepare questions to ask participants.
 - Anticipate questions or issues participants may raise.
 - Plan how you will conclude and make a transition to the next part of the session.
 - Practice and check the timing to make sure the presentation is not too long.

What you need to think about during your presentation

- Make sure everyone can hear you and see you - show your interest in the material by varying your voice tone and using open gestures.
- Monitor how much you are talking and how much time you are giving the participants to interact.
- Use all of the facilitation skills including asking questions, paraphrasing, summarizing, and encouraging.
- Keep track of your visual aids and keep the principal ones accessible and visible throughout the presentation.
- Pace yourself so that the presentation does not use up the time you want to devote to the experiential activity that follows.

Some techniques for making your presentations more interactive

1. Pose questions to the group. Facilitate the group to answer the question rather than answering it yourself.
2. Create discussion points in your presentation. Pick something that is an important learning point; ask the group their opinion. Get part of the group to analyze it from one direction and another part of the group from the opposite. Facilitate participants as they present their views to one another. You can then give your opinion.
3. Give problems to solve. Have the participants work out the problem individually. Then ask for answers. Take several. Add your input to theirs.
4. Occasionally give participants short (one, two or three pages) content pieces to read and then discuss it.
5. Have participants turn to the person they are sitting next to and think through a problem or an issue. Then ask for several responses. Add your input to theirs.
6. Ask the participants questions, draw points out of them. Let this make up the basic content of your presentation.

PREPARATION FOR PRACTICE

- You will continue working with your co-trainers
- You will be doing a mini-training session of 20 minutes
- You will need to adjust your content based on the time you have

Your design should probably follow this sequence

- | | |
|-----------------------|-------|
| • Climate Setter | 2 min |
| • Presentation | 5 min |
| • Small Group Task | 7 min |
| • Processing | 3 min |
| • Generalizing | 2 min |
| • Application/Closure | 1 min |

PREPARATION TASK

- With your co-trainer continue preparing your mini-training session.
- Make sure you are both clear on the key points you want to make.
- Create a 20-minute mini-design of a topic of your choice.
- Using the guidelines for co-training, divide up the module equally between the co-trainers to prepare for delivery.

CO-TRAINING/FACILITATION, TEAM TEACHING...

WHAT IS IT?²

Co-training is where two or more (usually two) trainers work together to design and conduct a training session; however, it is much more involved than taking turns. It is two trainers who are merging their skills, expertise and experience to design, plan, and conduct a training session or program jointly, allowing the synergistic effect to contribute to a better product than either would have done alone.

The two trainers work collaboratively to design the training session, combining the thoughts of both to determine what they want this session to accomplish and what would be the best methods to use. Once the design is prepared, the trainers then plan who takes the lead for delivering which parts of the session.

Taking lead responsibility means that one trainer has responsibility for leading the group through that particular part of the session. While one trainer carries lead responsibility, the co-trainer supports the lead trainer in many of the following ways:

- adding relevant points to augment discussion;
- stepping in to clarify points;
- asking probing questions the lead trainer might have overlooked;
- monitoring small group tasks;
- writing participant contributions on flipchart;
- helping respond to participant needs or requests;
- listening for points to which he/she can refer later when in lead trainer role;
- preparing for a smooth transition from one trainer to the next.

Typically, lead responsibility would shift from trainer to trainer during the course of a workshop. This is a good way to establish with the group the co-equal status of the two trainers.

When two trainers work well together, the interchange of roles and the timing and pacing of their interventions happens in a way that is fluid and almost unnoticed by participants.

² Copyright 1995. All rights reserved. Adapted from McCaffery, J. and Gormley, W. "Guide to Co-Training". 1988: Training Resources Group. Alexandria, VA

A CO-TRAINERS' GUIDE

Preparing

1. Discuss and share any knowledge or expectations you have about the participant group.
2. Discuss who will take lead responsibility for delivering particular pieces of the workshop.
3. Decide where the co-trainer will be when the lead trainer is up-front.
4. Agree on ways you can intervene if time is getting tight.
5. Decide how you will handle the following as a team...
 - (a) over-talkative participants
 - (b) late-comers
 - (c) times when one trainer misses an instruction or makes a design error
 - (d) silent participant
 - (e) "housekeeping" problems
 - (f) co-trainer interventions (i.e., when lead trainer is up front and co-trainer intervenes)
 - (g) design problems that crop up during a session
 - (h) disagreements between trainers in front of group
 - (i) the amount of time you expect to spend each evening preparing for the next day.
6. Identify any specific items around which you would like feedback from your co-trainer

PRESENTATIONS FEEDBACK

Individually, take 2 minutes to respond:

- What did presenters did well?
- What can they improve?
- How was the co-training process?

