
Foundations of Facilitation *for Parenting Educators*

WORKBOOK

The development of this curriculum was funded by



Thank you to Parenting Now! and the Oregon Parenting Education Collaborative for their assistance in creating these materials.



GENERAL INSTRUCTIONS

There are three Foundations of Facilitation downloadable files that work in concert as supporting materials for this Parenting Educator training:

1. Foundations of Facilitation

Workbook (PDF): Download, print and distribute to Parenting Educators who will be participating in the training.

2. Foundations of Facilitation

Presenter's Guide (PDF): Detailed training notes, scripts and handouts for the Parenting Educator training facilitator.

3. Foundations of Facilitation Slide

Presentation (PPT): The companion presentation for the training facilitator.

These materials can be downloaded at:
www.tfff.org/FOF

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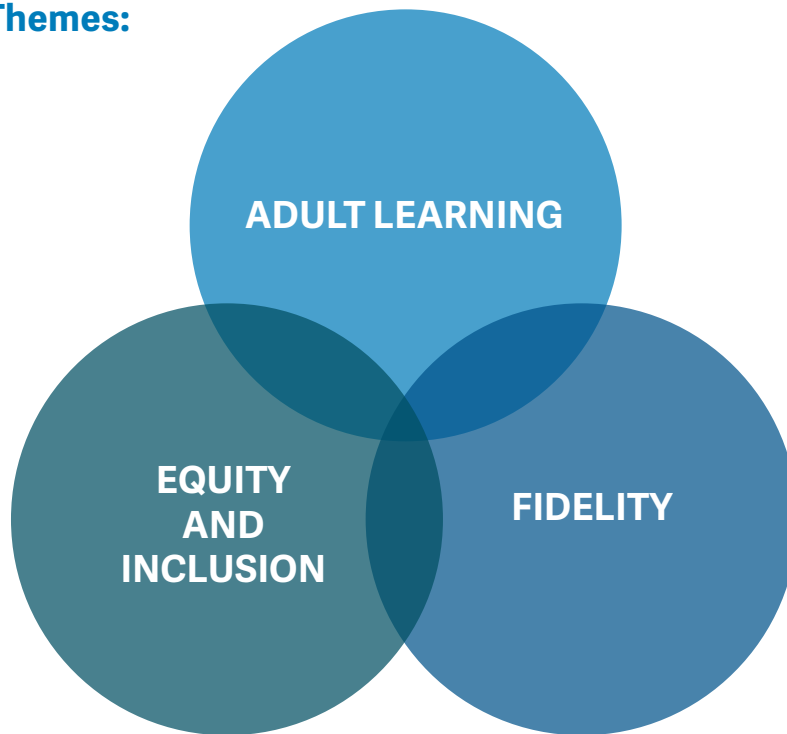
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Our Core Focus

Adult Learning, Fidelity, Equity and Inclusion are the heart of the facilitation process. These three areas are integrated throughout the Foundations of Facilitation training.

These Central Themes:



ADULT LEARNING: Understand the important considerations while facilitating a group of adult learners.

FIDELITY: Ensure program integrity is maintained.

EQUITY AND INCLUSION: Model a just and equitable environment that is open to diverse participation and perspectives.

Facilitator Competencies

An exceptional facilitator makes the job look simple and effortless. However, there are many underlying tasks, tools, attitudes and responsibilities working together to support effective facilitation. A skilled facilitator aspires to the following competencies. These competencies are a snapshot of a facilitator's job description.

1. Establish a Safe and Comfortable Learning Environment

Show interest and enthusiasm

- Greet participants personally and smile.
- Introduce yourself.
- Introduce participants to each other.
- Use appropriate icebreakers and openers that immediately involve participants.
- Use name tags.

Establish and use group agreements

- Create group agreements with participants.
- Post group agreements.
- Refer to them when needed.

Treat participants with respect

- Maintain the self-esteem of others.
- Maintain group agreements.
- Follow through on your commitments.
- Recognize and solicit the experience and knowledge participants bring to the group.

Notice and respond to nonverbal cues

- Be observant and look for behaviors that may indicate a problem.
- If participants look angry, bored or confused, check perceptions with the group or with an individual during a break.

Create a comfortable physical environment

- Prepare the room before participants arrive.
- Set up room to foster participation.
- Check with participants on room temperature.
- Provide appropriate snacks and beverages.

2. Facilitate Participant Understanding

Clarify and establish program outcomes and participant expectations

- Post agenda.
- Review the program outcomes and expectations.

Facilitator Competencies (continued)

Give clear instructions

- Prepare the group by writing specific instructions on a flip chart.
- Make sure that participants are settled into their work groups before giving instructions.
- Provide an example or model of what is expected, if appropriate.
- Ask clarifying questions to ensure all participants understand directions before starting an activity.

Use language familiar to participants

- Use vocabulary appropriate to participants' backgrounds.
- Avoid jargon.

Make clear transitions

- Let participants know when you are moving on in the agenda.

Monitor activities effectively

- During activities, circulate to check progress.

3. Demonstrate Effective Delivery Skills

Speak clearly and concisely

- Adjust voice volume so you can be easily heard.
- Vary your pace and tone.
- Speak in complete sentences.

Make eye contact with participants

- Make direct eye contact (if culturally appropriate).
- Non verbally communicate interest, confidence and caring with direct eye contact.

Demonstrate active listening skills

- Use body language, such as nodding your head to show understanding and encouragement.
- Paraphrase without distortion.

Demonstrate constructive body language and movement

- Avoid distracting movements such as too much walking or pacing.
- Move toward people to draw them into the discussion.
- Use natural, controlled gestures.
- Avoid defensive postures, such as folded arms.
- Stand with open body posture, shoulders back and relaxed arms.
- Show positive affect by smiling and making eye contact (when appropriate).
- Walk around and "own the space."

4. Foster Group Participation

Provide positive feedback

- Use simple, powerful words of encouragement, such as *"That's an interesting point," "I'm glad you brought that up."*

Facilitator Competencies (continued)

- Clarify and build on ideas suggested by participants, such as “*As Jane mentioned earlier...*”
- Use statements that communicate acceptance and clarification of feelings such as “*You seem to feel strongly about this issue.*”
- Smile.

Use a variety of learning and teaching techniques

- Vary learning activities and limit time in presentation format.

Use effective questioning

- Direct questions to the group.
- After asking a question, wait for an answer by silently counting to ten.
- Ask open-ended questions beginning with “*how, when, where, which.*”
- Solicit opinions and encourage participants to share ideas, such as “*Can you tell us more...*”
- Use polling “*How many of you?*”

Manage levels of participation

- Use a variety of strategies to balance group participation, for example, small group sharing, role plays, games, discussions and structured activities.

5. Demonstrate Command of Technical Competencies

Use visual aids effectively

- Visual aids (such as PowerPoint slides) are aids, not the presentation—use visual aids to capture attention, reinforce points, organize information, or promote understanding.
- Keep information simple and easy to read.
- Be sure that visual aids are visible to all.
- Record participants’ comments as stated or ask for a summary.
- Set up visuals and test in advance. Create a back-up plan if technology fails.

Communicate program vision and objectives

- Share program key concepts, goals and objectives.

Use materials effectively

- Guide participants through materials by referencing page numbers or media.

Demonstrate professionalism

- Dress appropriately for your group. A good rule is to dress equal to or slightly above the level of your participants.
- Arrive early and well prepared.

6. Know Your Content

Child development

Parenting strategies

Stress and self-care

Prevention Strategies

- **Contact participants in advance of a group meeting to confirm attendance and answer questions.**
- **Be prepared:**
 - Know your content.
 - Set up the room.
 - Test all audiovisual equipment and technology.
 - Prepare and organize flip charts, supplies and handouts in advance.
- **Review the agenda at the beginning of the group meeting.**
 - Point out times for a break, snack or lunch.
- **Let participants know when you will have a break or snack.**
- **Use strategic seating arrangements for comfort and to encourage participation.**
- **Establish yourself as a credible facilitator by letting families know your qualifications and your commitment to parenting education.**
- **Establish group agreements.**

Learning and Retention

Research shows that lecture provides the lowest rate of retention. Teaching others has a 90% rate of retention potential. Therefore, the more opportunities you can find to provide participants with interaction, critical thinking and group work, the greater the likelihood of retention.

Training Technique	Retention Rate
Lecture	5 percent
Reading	10 percent
Audiovisuals	20 percent
Demonstration	30 percent
Discussion	50 percent
Practice	75 percent
Teaching others	90 percent

Source: *The Accelerated Learning Handbook*, Meier

Influences on Learning and Retention

Physical Health

Mental Health

Cognitive Skills

Social Connection within the Group

Interest

Stress Level

Trauma History

Relevance of Content

Adults Learn Best When They:

- **Are in a supportive environment**
- **Are allowed to define their own needs**
- **See personal growth opportunities**
- **Have material presented that is relevant to perceived needs**
- **Participate actively in cooperative and individual exercises**
- **Feel life experience is respected by the facilitator**
- **Can relate the material immediately to their life experience**
- **Know what the plan is for each session**
- **Are given clear instructions for activities**
- **Experience a variety of learning methods and media**
- **Are empowered with learning skills**
- **Receive timely feedback on practice activities**
- **Receive positive reinforcement for accomplishments**
- **Have their individual needs met**
- **Feel free to question and challenge**
- **Are respected**

Giving Clear Instructions

- **Break down the activity into the smallest steps.**
- **Place these tasks into chronological order.**
- **Post instructions so participants can see them (PowerPoint, flip chart or handout).**
- **Get the participants' attention.**
- **Clearly describe each step, being specific and literal.**
- **Provide enough detail that someone who isn't familiar with the task will be able to accomplish it.**
- **Where appropriate, provide an example.**
- **If the list of instructions is long and can be broken into different phases, present one "phase" of the instructions at a time. Share the second "phase" after people have completed the first steps.**
- **Consider asking someone in the group to repeat in their own words what is being asked of them.**
- **Ask "What questions do you have?" and be available to answer them.**

Program Fidelity

As a facilitator, you are the person responsible for the group, the material, and the program outcomes. It is important to adapt elements of the curriculum to your specific population. However, it is equally important to maintain program fidelity, especially if teaching evidence-based programs.

1. What does implementing with fidelity mean?

2. Why is it important to implement with fidelity?

3. What are the key considerations in maintaining program fidelity?

Program Adaptations

Types of program adaptations

Acceptable adaptations:

- Changing language—translating and/or modifying vocabulary
- Replacing images to show youth and families that look like the target audience
- Replacing cultural references
- Modifying some aspects of activities such as physical contact
- Adding relevant, evidence-based content to make the program more appealing to participants

Risky or unacceptable adaptations:

- Reducing the number or length of sessions or how long participants are involved
- Lowering the level of participant engagement
- Eliminating key messages or skills learned
- Removing topics
- Changing the theoretical approach
- Using staff or volunteers who are not adequately trained or qualified
- Using fewer staff members than recommended

Equity, Inclusion, Diversity, Personal Bias

Equity: The process of providing different goods, resources and services to meet individual needs; acknowledging that these supports might look different for each person.

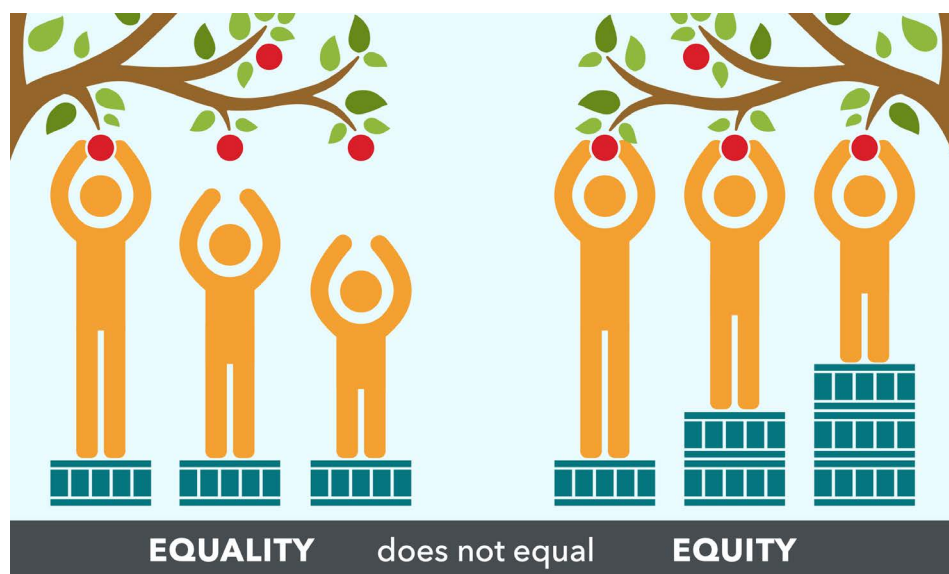
Inclusion: The involvement and empowerment of individuals within a group that promotes and sustains a sense of belonging; which values and practices respect for the talents, beliefs, backgrounds of its members.

Diversity: A multiplicity of shared and different individual and group experiences, values, beliefs and characteristics among people in a group.

Implicit Bias: Refers to the attitudes or stereotypes that affect our understanding, actions and decisions in an unconscious manner. These biases, which encompass both favorable and unfavorable assessments, are activated involuntarily and without an individual's awareness or intentional control.

Working Towards Equity Means:

- **Eliminating the predictability of success and failure that currently correlates with any social or cultural factor.**
- **Interrupting inequitable practices, examining biases, and creating inclusive and just conditions for all.**
- **Discovering and cultivating the unique gifts, talents and interests that every human possesses.**



source: <https://healthequity.globalpolicysolutions.org/about-health-equity/>

Types of Questions to Use in Facilitating Groups

Type of Question	Format / Function
Open	Asks for free expansion, does not limit the response
<i>For example: Could you tell me about how you might do that?</i>	
<u>WRITE YOUR EXAMPLE:</u>	
Focused	Requires a focused response
<i>For example: What are some of the challenges you face when you go to the grocery store with your child?</i>	
<u>WRITE YOUR EXAMPLE:</u>	
Closed	Requires a Yes / No response; often used to confirm
<i>For example: Have you ever experienced this before?</i>	
<u>WRITE YOUR EXAMPLE:</u>	
Multiple Choice	Forces the other to choose between pre-defined options
<i>For example: Do you want to focus on routines, or discipline, or adult relationships?</i>	
<u>WRITE YOUR EXAMPLE:</u>	
Situational	Describes a situation and asks the respondent what they would do (a form of an open question)
<i>For example: If you were the participant of a one-year-old and your child hit another child, what might you do?</i>	
<u>WRITE YOUR EXAMPLE:</u>	
Leading	The question telegraphs the desired response
<i>For example: Don't you think discipline is about teaching and learning?</i>	
<u>WRITE YOUR EXAMPLE:</u>	
Threatening	The question is an attack or its answer reflects negatively on the respondent
<i>For example: Why do you believe you already know all of this material?</i>	
<u>WRITE YOUR EXAMPLE:</u>	

Questions

Generally, begin with open questions to allow participants to think.

What are your goals for your family?

Follow up using focused, closed or multiple-choice questions to gain specifics.

Which one do you want to focus on first?

Use situational questions to help participants generalize to their own lives.

How will that look at bedtime?

Follow up with a closed question to confirm your understanding.

Your plan is to practice giving your child your full attention at bedtime, is that correct?

CAUTIONS

- Avoid using rapid series of focused or closed questions.
- Avoid using leading questions or questions with obvious answers.
- Allow time (10 seconds) for people to respond (use of silence).
- Avoid answering your own question.
- Listen. Beware of being so focused on your next question or your response that you fail to listen.

Facilitation Skills

1. Paraphrase – to confirm and clarify understanding

Say in your own words what a person just said and then ask if that is what they meant. This reflective listening technique is effective when used in moderation. Otherwise, it can become repetitive and tedious.

2. Draw People Out – to help speaker develop a line of thought

Example: Ask *“Can you say more about that?”* to encourage a speaker to clarify or develop initial comments.

3. Keep the Group on Track

Example: *“Wait a second; I think we are getting ahead of ourselves. Let’s get back to the topic.”*

4. Encourage – to draw people into a discussion

Example: *“Who else has something they want to share?”* Or *“Let’s hear from some of you who haven’t spoken in a while.”*

5. Balance – to allow for sharing of different points of view

This is useful when most members of a group appear reluctant to voice disagreement with something another person has said. Example: Restate the point just made and then ask *“Does everyone see it that way or are there other points of view?”* Or *“What are some other ways of looking at this?”*

6. Acknowledge Feelings – to increase acceptance of each other

Pay attention to the emotional tone of speakers. Pose a question or make an observation to name the particular feelings you sense. Example: *“Seems like you might be feeling anxious, am I correct?”*

7. Validate – to help participants feel understood

When a participant shares an experience or feeling, we could use a supportive comment. Example: *“It sounds like that was very difficult for you.”*

8. Use Empathy – to avoid becoming defensive

Imagine you are in the participant’s shoes. Example: *“I think I’d feel really sad, too.”*

9. Use Intentional Silence – to allow people to think

After asking a question, give participants time to respond. Avoid the temptation to jump in and fill the silence.

10. Listen for Common Ground – to help connect the group

This focuses the group on ideas or things they have in common. Example: *“A number of you have talked about how difficult that can be.”*

Facilitation Skills (continued)

11. Summarize – to consolidate thinking and move on

Bring closure to a discussion in a way that helps participants consolidate their thoughts and be ready to move on. Example: *“We have been talking about listening to our children and all the things that get in the way. Now let’s move on to the recipe for good listening.”*

12. Using the Clock – to get people last chance to speak

Point out the remaining amount of time, either in terms of minutes left or the number of comments you can still take. Example: *“We have only five minutes left, and I want to make sure we get a chance to hear from everyone.”*

13. Summarize as you go – to provide structure to the content of the session along the way

State what you have just covered, what the main points were, how this fits in the overall framework and where you are going next.

14. Link – to connect participants to each other, to the content, to the child’s point of view

Listen for opportunities to make connections. Example: *“That reminds me of what Aisha shared with us earlier.”* Or *“That is an excellent example of a tool that we will be talking about some more after the break.”* Or *“Sounds like you had a wonderful trip to the park. How did your daughter respond?”*

15. Use the Group – Send the question back to the group to get their input

Example: *“What do you all think?”*

16. Follow-Through on Process Agreements

Example: *“Oops! I think we forgot our brainstorming agreement. Let’s not evaluate ideas until we’re finished.”*

17. Articulate the Confusion – to get the group back on track or when participants are talking over each other

Example: *“Oh, sorry. I’m not quite tracking this conversation. Ana, can you share your ideas again?”*

18. Acknowledge What is Happening – identify and describe what is going on

Check for agreement after you make your observation. Example: *“It seems like we are all ready for a break.”*

19. Refer to the Agenda – to regain focus or decide how to proceed

Example: *“Let’s take a look at our agenda and decide how we want to spend the rest of our time.”*

20. Minimize YOUR Talking

Example: *“I feel like I have been talking a lot. I would really love to hear your thoughts about this.”*

Facilitation Skills (continued)

21. Allow for Different Opinions – to avoid letting the group get locked into an argument when they disagree

Example: *“There are some really different ideas about this. It sounds like some of us think A and others think B.”*

22. Make Space – to bring specific participants into a discussion

Example: *“Maya, is there something you would like to add here?”* Or, *“Andre, it looks like you have a point to make.”* Identify individuals to draw out by looking for gestures that indicate they want to speak but aren't jumping in. For example, you might see someone nod, lift their index finger, or give other non-verbal cues.

23. Sequence – to handle multiple conversations

Sometimes a conversation heads off from the initial topic. Sequencing validates both conversations, helps the group pay attention to one line of thought for a bit and then pay attention to the different one. Example: *“It seems that we have two conversations going on simultaneously. Let's take a couple more comments on the current one and then I'll have (name someone) remind us where we were on the first conversation.”*

24. Deliberately Refocus – to provide opportunities for other topics

At times, a topic has been discussed to the point that it seems done or seems to be dominating other issues that also are of interest to participants. Or, perhaps only a couple people are monopolizing the conversation. Example: *“A few moments ago John made a point, and no one responded. Before we lose that thought, I want to check if anyone has comments.”* Or *“We've been discussing topic A for some time now, and people have expressed a desire to discuss B. Is now a good time to switch?”*

25. Use Group Agreements

Example: *“I wonder if we might want to refer back to the group agreements; there are an awful lot of side conversations.”*

26. Accept Points of View – to recognize opinions without judgment

Acknowledge and accept a speaker's opinion. Accepting does not necessarily mean you agree. Example: *“I see where you are coming from.”* Or *“I understand what you are saying.”*

27. Brainstorm – to build a list of ideas quickly

Example: *“For the next five minutes let's share our ideas. Let's suspend judgment of specific ideas while we generate our list. We'll discuss the ideas after we capture them all.”* Honor all that is said by writing each person's contribution.

28. Use Humor – to lighten the mood, to make a connection, to change the subject, or just to make the group fun.

Strategies to Manage Common Challenges in Groups

Side Conversations

- Address the behavior directly: *“I’m having a hard time hearing”* or *“Let’s all give Sue our attention.”*
- Stand close to chatty group.
- Revisit group agreements.

One Person Dominates

- Break eye contact.
- Remember to go back to the interrupted person.
- Ask for ideas or comments from those who had not yet spoken.
- Say, *“This is interesting, perhaps we can continue with this later. Let’s get back to talking about...”*
- Ask others if they had a different concern.
- Use an object that must be held by the person who has the floor to speak.
- Explain the time frame beforehand (*“We have 15 minutes to check so we can hear from everyone—that breaks down to about two minutes each.”*)

Silent Members

- Allow an opportunity for each member to respond to questions and during check-in.
- Pair the silent person with someone other than his or her spouse/partner.
- Connect one-on-one to make sure the group is meeting his or her needs.
- Know their names, greet them and make a point of connecting each meeting.
- Ask their opinion about an experience you know they have had (*“How was the pool when you took your children there last week?”*).
- Just because they are not participating, it doesn’t necessarily mean that they are not benefiting from the group or that there is something wrong. Check out your perceptions with the person.

Person Who “Knows it All”

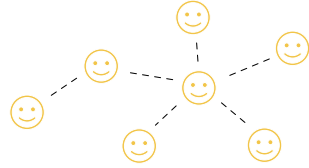
- Look for and point out the strengths in this person.
- Look for opportunities to talk with this person outside of group.
- Use their energy by giving them a “job” or task to help with.
- Ask other participants to share what they know about the topic.
- Be understanding and compassionate.

Participant Disagrees with or Challenges the Facilitator Directly

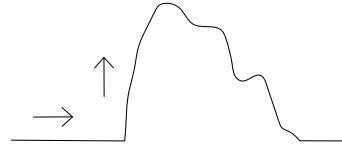
- Be prepared by knowing your content.
- Talk with the person privately about how you can work together.
- State what you know and acknowledge that you may have to disagree.
- Avoid arguing.
- Set clear boundaries.
- Avoid taking it personally and getting defensive.
- Listen and demonstrate understanding even when you disagree.

10 Ways to Develop Resilience

1. Make connections and build your social support network.



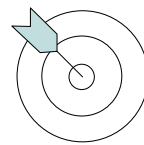
2. Avoid the tendency to view crises as insurmountable challenges.



3. Accept that change is a natural and unavoidable part of life.



4. Move towards your realistic goals.



5. Take decisive action that will help you face your challenges.



6. Look for opportunities that promote self-discovery.



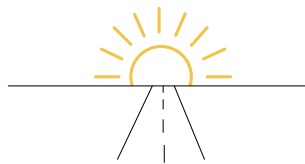
7. Nurture a positive view of yourself and your abilities.



8. Keep things in perspective and in context.



9. Maintain a hopeful outlook on life.



10. Take care of yourself.

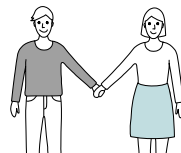


Four Themes of Resilience training:

Resilient Thinking



Effective Relationships



Managing Emotions



Building on Strengths



You can download the printable version of this infographic at

<https://positivepsychologyprogram.com/wp-content/uploads/2017/06/10-ways-to-develop-resilience.pdf>

Your Personal Facilitation Philosophy

It's logical to assume that the keys to becoming more skillful are to practice often, gather more tools and hone your skills. While these activities are clearly important, a helpful step toward reaching an advanced level is the development of a personal philosophy of facilitation.

Having a clear set of principles and practices firmly in place will act as a foundation. It will ground you and make you more resilient in challenging situations. A clear personal philosophy will guide your interactions with others and provide you with a rationale when considering which elements to include in any group.

To help you develop a personal philosophy, consider adopting the following principles:

- Facilitation is grounded in a sincere respect for all group members.
- Facilitation is a trans participant endeavor characterized by honesty and positive intent.
- Facilitators believe that everyone possesses the innate wisdom that can be harnessed and channeled for the good of the group.
- Facilitators advocate empowerment and participation so that groups buy in and own their group experience.
- Facilitators value the power of the group to help each participant learn and grow in their role as participants.

To help you create a personal facilitation philosophy:

- "Why do I want to be a facilitator? What are my motives?"
- "What do I bring to the people I facilitate?"
- "What's unique about my work as a facilitator?"
- "What elements must always be present in my work?"
- "What actions or activities will I always exclude from my work?"
- "What are the most important outcomes of my work?"

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Excellent Energizers

- **Short (30-60 seconds)**
- **Involve movement and sound**
- **Are appropriate for your group's ability to move and make sound**
- **Related to content**
- **FUN**

List of minute or less energizers

Beach ball grunt: Toss around a beach ball. Has to get to every table and when the person hitting it has to make a Serena Williams-style tennis grunt.

Body blither: Start by vigorously wiggling your hands. Then add some shoulders, hips, legs and feet, and finally your head. The accompanying “blbl, blbl” sound that occurs when you relax your mouth and cheeks while vigorously shaking your head is fun and energizing too. (From Rhythms of Learning)

Imaginary dirty diaper (or hot potato): Ask everyone to stand. Keep throwing it around until everyone catches it. Once you catch it, you can sit down. Keep going till everyone is sitting down.

Jelly roll: Have group form a circle. Hold hands except for two people and on the count of three, have one of the two people who isn't holding a hand roll in until the whole group is a tight ball.

Joke time: Ask someone from the group to tell a clean, non-ethnic or racial joke.

Mental vacation: Ask participants to close their eyes and take a mental vacation. They can go wherever they'd like to go. After 30 seconds ask them to all pantomime what they are doing there on the count of three.

My Bonnie Lies Over the Ocean: Have participants form a circle (if possible). Everyone sings the song, “My Bonnie Lies Over the Ocean.” Each time the word Bonnie is spoken, the group stands if they are sitting or sits if they are standing.

Stretching or yoga: Take a five-minute stretch break.

The chicken dance: Put on music and lead group through dance.

The wave: Like in the baseball stadiums. Ask the group to stand and make the wave by putting arms over their heads. Say “Woooo” when the “wave” comes to them.

Three new handshakes: Greet three people but make up a new handshake each time.

Your bubble: Find a partner. Stand by your partner according to your normal comfort zone. Now, on the count of three, move outside of your comfort zone. Ask how it felt.

Your own personal zoo: Make an animal sound. Let folks know we are going to make our own zoo/barn. Ask each person to make animal sound on count of three.

Zap: Facilitator and participants stand in a circle. The facilitator asks the group to rub hands together to create friction (like Mr. Miyagi from Karate Kid). The facilitator leads everyone to take three deep breaths in unison. Then the facilitator calls out “One, two, three!” On the count of three everyone points into the center of the circle and yells, “ZAP!!!”

Effective Co-Facilitation

Co-Facilitation Defined:

Facilitation of a group by two or more people in a cooperative, collegial manner. Each of the facilitators is capable of assuming the lead role and those who are not taking the lead are supporting the facilitator in various ways.

Forms of Co-Facilitation

Take turns:

Two or more facilitators take turns in the lead role.

Assist, taking other roles:

When not facilitating, the other facilitator(s) assist by taking other process roles such as minute taker, scribe, timekeeper, vibes watcher or gatekeeper. Having skilled people in these roles frees the lead facilitator to focus on the discussion.

Training:

An experienced facilitator works with a less-experienced one who, in addition to assisting, also has an opportunity to facilitate part of the group. The role exchange takes place at a point in the agenda where the trainee is most likely to experience success and gain confidence, with minimum disruption of the group.

Benefits of Co-Facilitation

- **Diversity:** Collaboration between facilitators of different gender, ethnicity, nationality and/or age sends a positive message about the value of diversity in leadership and brings a broader perspective to the group's process.
- **Stress management:** Long meetings can be exhausting for one facilitator. Rotating the facilitation duties is a good way to care for yourself and your group.
- **Letting go:** If you tend to believe that "I have to do it all myself, or it doesn't get done right," practicing co-facilitation may help you break this pattern of control.
- **Backup:** If one facilitator becomes overwhelmed, ill, injured or is called away for an emergency, the meeting can continue with the other facilitator(s).
- **Build confidence:** Working with a more experienced facilitator, watching how they work and anticipating what you can do to make her or his job easier is a good way to gain confidence, especially in potentially intimidating situations, such as large or conflictive meetings.
- **Joy:** Working in a team can be a delight.

Effective Co-Facilitation (continued)

Tips for Successful Co-Facilitation

- **One leader:** To simplify communications, designate one person as the contact person and leader of the co-facilitation team.
- **Clarify roles/tasks:** Co-facilitators should meet well before the group to plan how they will work together. Who will facilitate first? What tasks will the others perform when not facilitating? How often will they exchange roles? What unobtrusive signals will they use to communicate their needs to each other during the meeting?
- **Post-meeting evaluation:** Get together after the group to discuss what went well and what could be improved in the future.
- **Spirit of service:** Be humble. Pay attention. Serve the group well.

Warnings

- **Don't co-facilitate with strangers:** If you don't know proposed co-facilitators, try to observe them facilitate and establish a collegial relationship before agreeing to co-facilitate. At a minimum, meet with them in advance to get to know more about their experience and facilitation style. Discussing roles and mutual expectations can avoid unpleasant surprises for you and the group.
- **Don't take over:** If you are a very experienced facilitator working with a relative newcomer, resist the temptation to jump in and take over. Simply serve as the assistant and, if you coach the person during the group, do so quietly.
- **Don't trade off too often:** It is important that the group have a sense of stability and continuity during the session. Changing facilitators too often can be confusing, especially if your styles are very different.
- **Don't jump in too quickly:** Spend time as an apprentice before you try co-facilitating.
- **Never publicly criticize or argue with your co-facilitator during the group:** This behavior will only serve to damage your relationship and lose the trust of the group. If necessary, talk to the facilitator at a break or quietly suggest a break so you can discuss an issue.

Source: Beatrice Briggs

Mentoring and Co-Facilitation

Common challenges with co-facilitators (and how to deal with them)

A co-facilitator should be someone that you trust, or if you don't know her/him well, then there should be at least some basis of trust (you belong to the same group, you are working on the same goals). Facilitating with someone you do not trust opens up a lot of space for challenges. Preparation before the workshop is extremely important.

It is important to understand that co-facilitation is a partnership. The following tips work best if you and your co-facilitators make an agreement ahead of time that—if either of you needs help or makes a gaffe—then it is fine for the other person to step in.

Remember, it is important that you prepare fully with your co-facilitator several days before the workshop or training. Some of the following challenges can be dealt with in that prep. But, if something comes up that you don't anticipate, here are some tips to deal with it.

Challenge 1: Your co-facilitator shows up to the workshop and is not prepared. She/he has not reviewed the pieces that she/he is supposed to facilitate.

Helpful Hints:

- Acknowledge that you might need to change the plan.
- Assess what piece of the workshop your co-facilitator is prepared to facilitate.
- Assess if there is time for her/him to familiarize her/himself with the other pieces.
- If there is time, your co-facilitator should take the time to familiarize him/herself with it and then you should facilitate as planned.
- If there is not time, redistribute the division of facilitation. This may mean that you have to facilitate more but it's better than watching your co-facilitator stumble through and then having to fix the mess.
- After the workshop, debrief. Share your criticism with your co-facilitator.

Challenge 2: Your co-facilitator keeps dragging things off-topic, and—as a result—you are going to run out of time for the workshop.

Helpful Hints:

- Whenever possible, insert yourself into facilitation, and get things back on topic.
- As soon as possible, call for a brief break or ask participants to reflect silently. This will give you a minute to quietly and subtly check in with your co-facilitator.
- Share your observation about what is happening. Use concrete examples. Explain why it is a concern to you.
- Problem-solve together. Ask your co-facilitator if she/he wants you to help keep things on task or to give her/him a signal of things are going over time.
- Discuss it in your debrief.

Mentoring and Co-Facilitation (continued)

Challenge 3: Your co-facilitator says something that is factually wrong.

Helpful Hints:

Judge how important the mistake was. If your co-facilitator accidentally said that an incident happened in 1954, and it was really in 1955, you may just want to let it go. If your co-facilitator said that they are building 40 new jails in the state right now and in reality, it's four, you should interject.

If you do decide to interject, don't make a big deal of it. Try not to disrupt the flow, and try not to discredit or embarrass your co-facilitator. (For example: *"Actually I think it's four new jails, not 40. But it's still a huge number, especially since there are already so many jails in the state."*)

Challenge 4: Your co-facilitator is confusing the group.

Helpful Hints:

If you can't get a minute to speak to your co-facilitator alone, go ahead and interject. Acknowledge that people look confused and offer to say it in a different way. (For example: *"So, in other words, you are going to split up into groups of five and do a brainstorm."*)

Debrief with your co-facilitator, either when you can during the workshop or immediately after the workshop.

Techniques:

ALTERNATE FACILITATOR WANTS TO:	TACTIC:
Call a break	Hold up a "high five" hand in back of room
Make verbal comment	Move up to and stand off to one side of the "stage"
Take the stage	Move in close to one side of the stage
Start speaking	Agree that if one person starts to talk that the other facilitator will fade out and voluntarily give the stage to the speaking facilitator

Working with a Co-Facilitator Checklist

Discuss the group

- Discuss the context of the group (cultures, hot issues, goals, dynamics)

Prepare the workshop

- Discuss how comfortable you feel with the content.
- Discuss any pieces you feel uncomfortable with or unsure about.
- Discuss your personal connection to the material and how that may impact your work as a facilitator.
- Get familiar with any activities you have never seen and are not sure what they look like.
- Tailor the curriculum. Make any changes you see fit based on the needs of the group.
- Figure out who will facilitate what parts of the session.

Discuss working together as co-facilitators

- Discuss your strengths and challenges as a facilitator with your co-facilitator.
- Discuss how you will work together based on those strengths and challenges.
- Vocalize the support you would like to receive from your co-facilitator.

Make a plan for what still needs to be done

- Figure out if there is anything else that needs to be done based on the changes you made to the curriculum and assign tasks.

Check logistics

- Designate a meeting time and place. (Give yourself enough time to get there for set-up.)
- Double check the directions you both have.
- Swap phone numbers in case you need to get in touch with each other.
- Have a back-up plan for equipment or facilitator absence.

Pre-Class Preparation

The secret to a successful group is planning ahead and preparation. It is natural to feel a little anxious when getting up in front of a group. One of the most effective ways in combating any anxiety is to prepare fully. Always review course material before presenting—no matter how many times you have taught it.

Carefully review the facilitator's guide. As you become more familiar and comfortable with the material, your confidence as a facilitator will grow.

The leader's guide contains a detailed script to use for presenting and facilitating. It's okay and even preferable to put the script into your own words. Give appropriate examples from your own experience that may illustrate a point. However, do not change the essence of the content by getting too carried away with “war stories” from your professional experience. You may also wish to use a highlighter as you go through the material.

Never go more than 90 minutes without a break. If participants need to use the facilities and are thirsty/hungry, they may not be paying attention to the content.

Review the exercises, role plays and handouts.

- Review the directions and purpose of each exercise or role play. It is important that you understand how these activities support the overall objectives.
- If the activity requires people to work in groups, give thought to how and when to divide them into groups. Once people are asked to move into new groups, there is often chatter and some excitement. It is often best to give people directions before dividing them into groups for this reason. Tell people they will be moving soon, but ask them to listen to the directions before arranging themselves into new groups. For some activities, however, it is best to provide the group with instructions once they are arranged in new groups. Know which is appropriate before the exercise.
- Review guidelines on giving clear instructions and be prepared to explain what you are asking of participants step by step.
- If there is a handout, review the handout and be prepared to answer questions about its directions or content. Consider providing examples where extra clarity may be needed.
- If suggested answers are provided for these exercises, review these before using them. That way you understand the intent of the question, which can keep you from having to consult your notes for the answers while participants are left waiting.

Review the participants' materials.

- Look through the participant materials to see the room from the participants' perspective.
- Be sure to review the PowerPoint and handouts in conjunction with the participants' materials. All of these tools should be work together. If different language is used in one than another, be prepared to clarify this to participants as needed.

Prepare the materials.

Make all copies for the session a few days prior. It is never a good idea to begin the copy process the morning of a session. Review all materials needed for the session and have them ready to go before you meet.

Flip charts

1. Have a flip chart stand and blank pads ready.
2. Check to make sure the flip chart has enough sheets of paper for the classroom or meeting.
3. Make sure you have pens. (Watch out for the dreaded yellow marker. Some colors can be difficult for the participants to see.) Darker colors (black, blue, brown) are easier for people to read. Use other colors as highlighters or to accentuate your material (underline or circle).
4. Have two to three markers available. Using several colors adds visual appeal to the flip chart. (See the section on flip chart etiquette for additional information.)
5. When writing, allow for one additional sheet between each page you are writing on so participants cannot see through the sheet and notice other writing.

While using the flip chart, remember:

- Keep it simple.
- Use keywords or phrases, not whole sentences.
- To ensure readability, print in large block letters and use space effectively.

Flip chart Etiquette

Flip charts are low tech. They are reliable and don't require any special skills, but use them effectively.

1. The best flip chart stands have clamps at the top and will hold most types of flip chart pads. Most allow you to hang your flip charts while some stands will only allow you to prop them up. Don't wait until the last minute to find this out.
2. Make sure the flip charts you use will fit the flip chart stand you will be using. Some have different spaced holes at the top.
3. Flip chart pads are usually sold in packages of two and come either plain or with grid lines on them. Using the pad with grid lines makes your job easier for drawing straight lines and keeps your text aligned. Also, make sure the pad has perforations at the top to allow easier removal of sheets.
4. Design your charts on paper first, before drawing them on the actual flip chart pad.
5. Lightly write your text in pencil first before using the actual flip chart markers. This will allow you to make any adjustments with text spacing and any figures you will be drawing. Do NOT use all block letters (UPPERCASE). Using upper and lower case letters makes it easier to read. Follow the 7 x 7 rule. Have no more than seven words on each line and no more than seven lines to a sheet. Using a 6 x 6 rule is even better.
6. Use flip chart markers and not regular magic markers. Flip chart markers will not "bleed" through the paper. Also, they do not have as strong a smell as regular markers.

Flip charts (continued)

Flip chart Etiquette (continued)

7. Avoid using the colors yellow, pink or orange. These are extremely difficult. Avoid using too many colors. Use one dark color and one accent color.
8. You can write “lightly in pencil” any notes next to key points you need. The audience won’t be able to see them. You may also write what is on the next sheet. Knowing this information will allow you to introduce your next sheet.
9. If you make mistakes, use correction fluid to correct small errors. For larger areas, cover the mistake with a double layer of flip chart paper and correct the error.
10. Have a blank sheet of paper between each of your text sheets to prevent the writing from other sheets from peeking through.
11. Properly store and transport your flip charts in a case. This will protect your flip charts and keep them ready to use.
12. If you do not have neat printing, ask someone who does to prepare them for you. A poorly prepared flip chart can be very distracting.

The most important point to remember in preparing your flip charts is to start preparing them early. Creating flip charts can take a lot of time. Preparing your charts early enough allows you enough time to review them and make any changes.

By Lenny Laskowski, <http://www.ljlseminars.com/flipchrt.htm>

Testing the Technology

If you are using any technology, complete the following steps:

- 1.** Make sure all cords are taped down to the floor if they are in any walk areas.
- 2.** Turn all equipment on before the session to make sure everything is in working order.
- 3.** If using PowerPoint, have your presentation ready and up on the screen.
- 4.** If you choose to use any videos in your sessions, test the equipment before the session begins.
- 5.** If switching from PowerPoint to an online video, have the video pulled up in the background so you can more easily switch from one to the other. Play the video before the workshop begins to ensure that buffering is smooth.
- 6.** Check speakers and sound settings. When switching from a PowerPoint to a video, turn the sound on and up to the appropriate volume.
- 7.** Use a remote PowerPoint advancer. This hand-held device will allow you to move around the room rather than standing near the computer to advance slides.
- 8.** Communicate and coordinate technology needs with your co-facilitator before beginning the training. Co-facilitators can be very helpful at swapping from PowerPoint to a video and back, adjusting volume and addressing other technology needs “in the background” while you remain engaged with the participants.

Arranging the Room

A comfortable training room reflects the quality of training. Take into consideration the following items to create a safe learning atmosphere for your class.

- Ensure that the room is the right size for the number of participants attending.
- There needs to be proper ventilation and lighting.
- Watch temperature. Encourage attendees to dress in layers. What is too hot for some is too cold for others.
- The facilitators and participants need to be able to hear each other.
- Visuals need to be seen from every angle in the room.
- Know where the electrical outlets are located.
- Set up a table for materials, if possible.
- Set up and check the PowerPoint projector and any other equipment you plan to use.
- Check for the location of parking, restrooms, smoking etc.
- Set out the refreshment table in an easy access area that will not create a distraction during class. Have an assortment of snacks (always include a healthy choice such as granola bars or fruit).
- Have water available.
- Identify ahead of time any outside distractions (traffic, outside room conversations or customers).

Seating

The seating arrangement and table set-up for a room can positively or negatively affect the comfort levels of the participants.

Consider the following when choosing a room set-up:

- **Groups of eight or less:** Circular or square tables promote a relaxed atmosphere and group participation.
- **Groups of eight to 12:** A rectangular table can seat eight to twelve people with the leader at the head. This arrangement promotes face-to-face conversation and places the leader on the same level with participants, which can increase their comfort.
- **Groups over 12:** Horseshoe – placing the conference tables end to end in a U-shape can accommodate larger groups. This configuration also allows the leader to walk among the participants. The room set-up will depend on the size of the room and the number of participants.
- **Groups over 12:** Round tables or pods – tables that are either round or two small rectangle tables pushed together. Groups of four or five at each table. This configuration is useful when you have group activities – they can become table conversations.

Greeting Participants as They Arrive

It is important to create a safe learning environment immediately. Greeting participants as they arrive is a part of creating that environment. Take a moment to introduce yourself or just say hello to participants walking in the room. This greeting is an often overlooked aspect of facilitator competency. It is, however, very important. Facilitation is most effective when the facilitator and the participants share a working relationship. Greeting participants is the first step in building this relationship.

In order to be able to greet participants, facilitators must arrive early enough to set up the room and have most preparations completed by the time participants begin to arrive. By arriving early, you can be in a position to be calm, relaxed and attentive to participants when they first set foot in the room.

Dividing People into Groups

Breaking into smaller groups can be a great time to energize the group, foreshadow the activity to come, prepare the group for success by ensuring each small group has the right people in it, and it can be done quickly and efficiently. It can also be done ineffectively and take a very long time, creating confusion and chaos along the way.

To ensure an effective and efficient division of a larger group into smaller groups, reflect carefully on when and how you will divide the group. It is best to give instructions to an activity prior to asking participants to move to a new location with a new group of people. Because the act of moving creates distractions: when people move, they chat and are no longer listening. Therefore, it usually is more effective to 1) tell people they will be moving, 2) ask them to listen to the instructions they will follow once they arrive at their new location, 3) give them the instructions, and finally, 4) ask them to move.

Next, decide on how you will divide people into groups. Here are some fun ways to efficiently group people:

Crossed arms: Have group stand. Ask them to cross their arms. Everyone whose right arm was on top is in one group. Everyone whose left arm was on top is in the other. This is typically half and half. You can redistribute as needed.

Fun ways to count off:

- Stand in alphabetical order by first name, middle name or last name. Then count off into the appropriate number of groups.
- Stand in order of how far you came to be here. Then count off into the appropriate number of groups.
- Stand in order of birthdays.
- For skits: Make a continuum from “dreams in skits” to “doing skits is to my soul is what nails-on-a-chalkboard is to my ears.” Then count off into the appropriate number of groups. This ensures that the skit lovers are evenly distributed.
- For drawing: Form a continuum from “love it, love it, love it” to “can’t draw a stick figure.”
- For activities that require deep knowledge of community: Make a continuum from “Have lived here all my life” to “just arrived.” Count off into the number of groups needed and redirect.
- For activities that require strong attention to detail: From “loves details” to “loves the big picture.”

Additional Breakout Ideas

A-Z: Have participants consider something with eyes closed that somewhat relates to current activity (Examples: *favorite family vacation, favorite family dinner, favorite family activity*). Then have them think of the first letter of that thing and organize themselves alphabetically by that letter. A-F at one flip chart, G-M, and so on, based on the number of groups you need. Give a few minutes for everyone to share in their group, ask for any highlights and move on to activity.

Birthdays: Form subgroups by birth months. For example, participants can be divided into three roughly equal-size groups by composing groups of those born in January, February, March and April; May, June, July and August; and September, October, November and December. Redistribute as needed.

Groups: Randomly hand out cards/paper with images such as bacon, egg, sausages (one on each card), strawberries, blueberries, blackberries and other such groups of things. Then get them to find someone with a card that “goes” with their card.

If already at table groups: Ask the participants with the most recent and next birthdays at the table to move one table clockwise. This activity is quick and gives the chance to sing happy birthday if there was or will be one.

Cut it up: Cut a comic strip or picture into pieces. Have participants with same comic strip or picture come together.

Dots: Stick different-colored dots on cards or on their place cards (if you use them) or on their materials. Ask participants to find other participants with like-colored dots.

Sock pairs: Have a bag of clean socks. Each participant picks one, then finds its pair. For larger groups, pairs join other pairs by size or color to form larger sub-groups.

Candy time: Hand out different flavors of gum, colored hard candy. Have everyone join the others with the same flavor, color or name to form a group.

Picture perfect: Place pictures of classic cars (or anything) in different areas of the classroom. Ask the participants to gather under the one they like most or least.

Stack the deck: Prepare by creating a stacked deck of cards with one card for each participant. Stack your deck with two, three or four-of-a-kind cards, corresponding with the number of participants per group. Make sure the deck is shuffled. Pass out cards to each participant. Ask participants to find the other participants who have the same numbered/face card. Using playing cards to form small groups is particularly helpful when you want to have participants work in pairs and then combine the pairs to create groups of four.

Monitoring Activities and Time

As the facilitator, you are responsible for meeting the expectations of the participants within the timeframe you have allocated. Often this is the facilitator's biggest challenge of leading classrooms and meetings.

Here are some tips:

- Make a commitment to start and stop on time.
- When people leave for breaks, remind them of when they need to return (write the time on the flip chart; make returning from breaks on time one of your ground rules).
- Give participants an "odd" number – say *"take a nine-minute break"* and they will return closer to the nine minutes. If you say *"take a 10-minute break,"* it typically turns into a 15-minute break.
- If people need a break, see if you can take one immediately or do a "quick break" to tide you over to the real break (brain teasers or physical stretches).
- Try not to let your "clock watching" be too obvious. Put your watch on the table in front of you.

Another aspect of managing time is paying attention to your agenda. If you realize you are getting off-track and losing time, re-evaluate your plan. Take out activities and sections that are not critical. Remember "less is more," and it is better to ensure you are incorporating the most important aspects of the training – let the trivial go.

Managing Time

Even though the participants are engaged in an activity, the facilitator still has important work to do. The following are some guidelines for monitoring time and activities to keep things on track.

- In the first few minutes of the activity, expect some confusion and/or frustration. It's okay. Some of this helps encourage problem-solving. Remember, participants are learning by doing.
- Move about the room silently to make sure the participants are on track.
- Remain in your role as facilitator. Resist becoming directly involved in the activity. Don't give advice, opinions or praise for one comment over another.
- If you feel a group is off track, ask guided questions or give suggestions. Avoid jumping in to assist too quickly. Intervene only when necessary. Check for roadblocks and redirect if the group has gotten off task.
- Remind participants of time passing. Give them signals half way through a particular stage and also a two-minute warning for each deadline.
- Use your judgment about calling time. In some cases, you may have to allow extra time. In other situations, the small groups may finish earlier than anticipated and be ready to move on.
- In some cases, groups will finish at different times. You can use breaks to allow those who have finished to take a break while another group finishes. "We'll start back in 15 minutes. If you have finished, you can go ahead and take your break."
- Consult with other facilitators if you feel the time frames need adjustment.

Objectives

Many different learning opportunities may emerge from any one activity. Thus, it is very important for a facilitator to be aware of the intended learning objectives so she/he can thoughtfully plan the activity to ensure the intended learning points are highlighted.

Be sure to review the objectives of each activity. Then consider what questions will best engage participants in exploring those ideas and concepts. This preparation will powerfully enhance the learning potential of each activity.

Gardner's Multiple Intelligences

The work of Harvard Graduate Professor of Education Howard Gardner led to the conclusion that there is not just one way to be smart; there are more than 200 ways. Gardner researched the nature of intelligences and defined it as the ability to: 1) use a skill, 2) fashion an artifact, and 3) solve a problem in a way that is valued by the particular culture of that individual.

Gardner grouped the array of human intelligences into just eight categories. Instead of having one single figure or mark that assesses our intelligence, he says that each of us has our own unique combination of these intelligences and that they can and do change over a lifetime. The eight categories include:



Gardner's Multiple Intelligences

Categories and Descriptions

CATEGORY	DESCRIPTION
Logic Smart	The ability to solve problems, do math, fix, repair, troubleshoot, understand order, program, and do puzzles.
Picture Smart	One's relationships to objects and others, dance, sports, packing, parallel parking, driving a truck or bus, ice skating, flying a plane.
Body Smart	Mime, acting, sports, performance, dramatics.
Music Smart	Clapping, drumming, composing, playing music.
Word Smart	Use of words, language, reading, writing, word puzzles, speaking, arguing, jokes, explaining, debating.
People Smart	Reading other people, social skills, cultural bonding, rapport building, empathy, building relationships.
Self Smart	Introspection, self-assessment, reflection, goal making, journal writing, vision, planning, knowing weaknesses and strengths.
Nature Smart	Enjoys gardening, interest in social issues, human motivations, and conservation of resources, likes wildlife and pets.

Additional Resources

The following materials have been shared by the Oregon Parenting Education Collaborative and What Works, Wisconsin team at the University of Wisconsin–Madison, School of Human Ecology, and Cooperative Extension, University of Wisconsin .

Program Fidelity Rating Tools for Oregon Parenting Education Collaborative (OPEC):

- Monitoring Fidelity in OPEC Series 2019 — PDF Slide Presentation
- OPEC Fidelity Guidelines
- Fidelity Best Practices Shortened Tool (PDF)
- Fidelity Checklist for Facilitators (PDF) & Fidelity Checklist for Facilitators Guide

To download these resources, visit the OPEC website:

<https://orparenting.org/parent-educators/resources/>

What Works, Wisconsin: Research to Practice Series:

- Culturally Appropriate Programming
- Strategies for Recruiting and Retaining Participants in Prevention Programs
- Program Fidelity and Adaptation
- Best Practices for Parent Education and Support Programs

To download these resources, visit the What Works Wisconsin website:

<https://fyi.extension.wisc.edu/whatworkswisconsin/research-to-practice-briefs/>

