



# Facilitating Workshops

## Practical Tips for Workshop Facilitators

### Expectations & 'Learning Outcomes'

To be effective you need to have a clear idea of the desired outcomes of your workshop. Sometimes this will be driven by you – you will have key information or skills you want to deliver to your participants whether they like it or not (though hopefully they do!). Sometimes the workshop will be in response to requests from the participants. The best workshops are those where your preferred outcomes, and the expectations of the group coincide.

So, before you plan & deliver the workshop you need to think about what you hope to achieve, and to find out what is expected of you.

To find out participants' expectations, you need to ask! Either ask the organiser, or build a quick 'expectation check' into the introductions section of your workshop. However, don't raise hopes that you will change the prepared agenda to suit their expectations if that's not possible! As you build confidence you will be able to change agendas to respond to the group's expectations on the day.

In a long workshop you may be able to check that you're meeting expectations at the end of the first day, or after a lunch break.

### Agenda Preparation

Unless you are supremely confident, you will have prepared a workshop agenda in advance. You not only need to think about how the agenda will work as a whole, but also about how each exercise will work individually. Does every session have a good reason for being there? Maybe *you* like the exercise, but does it serve a clear purpose in this context?

When setting learning outcomes, and thinking about expectations, think about all the constituent parts as well as the whole.

The agenda should also:

- Reflect the different learning styles of the participants (see below)
- Vary in pace and style to maintain interest & learning
- Contain a suitable mixture of theory and practical, experiential sessions.
- Take into account natural highs and lows in energy (e.g. sessions immediately before & after a mealtime will be natural low points). Don't just ignore this – take it into account and deal with it!
- Follow a logical order to achieve learning outcomes.
- Try to end on a positive note. Active final sessions are good for this. Alternatively run a "where do we go from here" session where everyone looks for something positive from the workshop and decides how they will implement it, or run an uplifting game at the end to wrap up the workshop. An alternative is a period of reflection at the end to allow for the learning to sink in.
- Use relevant handouts. Sometimes these will be comprehensive documents, other times a summary of the key points of the workshop. Sometimes you may just want to give people some pointers as to where they can find more information. Handouts of this kind act to reinforce the learning and help move it from short term memory to long term memory!

## Facilitating a session

Be aware of your own personal limitations when delivering any kind of workshops. Check in with yourself (and your co-facilitator if relevant) before the session and make any changes you need to suit your mood and energy levels! Look after yourself – make sure you keep bloodsugar levels up, and drink enough water/tea etc!

Don't forget that the group is your most significant asset. As well as checking that you're meeting their expectations, use the group to solve any other problems. If a session isn't going as smoothly as planned, if energy levels are low, ask the group what they want to do about it (but have some suggestions up your sleeve). *Never* be afraid to admit your fallibility, and move on to the next exercise, if the group aren't engaging with the current one!

## Evaluating

Evaluating with the group is just plain good practice! Build at least 5 minutes evaluation time into each workshop agenda. Don't just evaluate the contents. Ask questions about the quality of your facilitation, whether you met expectations, the length of the workshop, the pace etc. You can also ask if there are other workshops the group would like. Here are three common ones:

- **The Evaluation Form** – prepare a form that has room for comments and maybe room to score different aspects of the session. The evaluation form takes a bit longer to fill in, but can glean you more information than other methods. Remember to phrase the questions neutrally. NB: take lots of biro's with you – that way no-one has an excuse not to fill it in there and then!
- **Go-Round** – simply go round the group asking everyone to say one thing that worked well, one that didn't (or equivalent positive/negative questions). This shouldn't feel compulsory for participants, and you shouldn't get defensive if the workshop comes in for criticism. Accept the comments and move on to the next person.
- **The Pie Chart** – draw a large circle and divide into slices. Each slice can then be marked to represent different exercises, expectations, quality of facilitation or anything else you want evaluating. Everyone grabs a marker pen and puts a small cross in each slice. The nearer the centre of the pie they place their cross, the higher they score that section. This is quick and easy, and very visual – trends become apparent from a quick glance!

## Flipchart Facilitation

You'll often find yourself standing in front of a flipchart, over head projector (OHP) or whiteboard. Here are some guidelines for using them:

- Ask if everyone can see the writing? If not either move the OHP or flipchart or ask participants to move.
- Talk to your group not to the paper! It's better to pause whilst you write than lose what you're saying in the process. If you're co-facilitating, have your co-facilitator write on the flipchart for you, or ask one of the group to do it.
- Check before using green or red pen – some people can't see these colours very well, or have trouble distinguishing one colour from the other.
- Write in lower case letters – the eye finds it easier to read them from a distance. And of course, write big enough!
- When writing up comments you are aiming to accurately restate or summarise the comments made. Make sure you check with the person who made a comment before you drastically shorten or reword it - you may have misunderstood which could cause offence!
- Don't show any favouritism – value all contributions equally and write down everything. If there's a reason why you're not writing something down (because it's already on the paper, for example, or it's simply incorrect) explain it to the group.
- Don't be bound by a flipchart stand. Flipcharts works as well on the floor in the middle of the group (but again make sure everyone can see).

## Confidence

The more confident you are as a facilitator the safer a learning environment you create. The natural authority that comes with confidence gives the skills or information you're imparting a greater authority too!

It's not simply a case of how well you know your material. The basic rules of communication tell us that your body language and the tone of your voice give out the strongest signals (in that order). So no matter how good your flipcharts and handouts, or how articulate you are, if you sound and look nervous it'll undermine your group's confidence, not just in you, but also in the skills or information you're delivering! It's a daunting thought, but don't let it put you off.

Some facilitators recommend using visualisation to build confidence. We've all been in situations in which we were confident. Everyone's good at something. Remember what it feels like to be confident? Can you feel the effect it has on your body language? Can you hear the sound of your voice speaking confidently? Now walk into your workshop session in that space – with that body, and that voice.

Of course you can also warm up. Again, some facilitators recommend warming up both your body and voice prior to a workshop. You might also need to spend some quiet time mentally rehearsing the workshop. Mental rehearsal is a powerful tool for learning and for building confidence. Think through how the workshop will work. See it going well – dynamic, interactive, enjoyable... see yourself in there confidently facilitating all that enjoyable learning.

Being confident doesn't mean the same as being an expert. Nor does it mean being infallible and detached. Arrogance will not inspire your group. You can still throw questions out to the group, feeling confident that they will help you find the answer. You can still make mistakes, confident that the group will forgive you, and that the workshop will continue and be successful. Confidence is not perfection!

## Learning Styles

There are many theories about how people learn (their 'learning style'). What is clear is that different people learn in different ways. Some will learn just fine, if you stand at the front and lecture them. Others will learn from a well structured written handout. But to ensure everyone has equal access to learning, you need to vary your style. That's why we use workshops not just handouts or lectures (although there might be some parts of a workshop that are more presentational, or backed up by a handout).

### Auditory, Visual & Tactile Learners

This is one useful way of looking at your workshop - if it meets the needs of people that learn through these 3 media, that's an excellent start!

**Auditory Learners** learn from listening. They learn best from lectures, discussions, talking through ideas and listening to other people. They are sensitive to the tone of voice, and to underlying meanings in people's speech. They may well prefer to read information aloud (written text will have little meaning to them until they have heard it read) and respond well to music and other sounds.

**Visual Learners** learn by looking. They like to have a clear view of workshop leaders or lecturers, and are sensitive to facial expression and body language. Pictures, charts, graphics, videos, colours are all useful tools to help visual learners learn. They may well like to take notes (spoken information will have little meaning until they see it written down).

**Tactile Learners** learn by doing, moving and touching. They learn best from a hands-on and active approach. They need to move and will struggle to sit still for hours on end, responding well to active exercises (written or spoken information will have little meaning until they have had a chance to engage with it physically). Spectrum lines, hassle lines and roleplays (see *tools* below) will help engage tactile learners.

Look over each agenda to ensure that there is something for everyone. For the key points you need to convey, you may have to provide an exercise that incorporates a little of each.

A balance of a brief factual introduction presented verbally, but backed up with graphics, flipcharts and a handout, some groupwork (such as a brainstorm or go-round) followed by a practical session (such as a roleplay) will usually engage everyone.

## **Activist, Pragmatist, Reflector and Theorist learning styles**

**Activists** are quick, creative thinkers. They like to engage with an exercise for a short while and with considerable enthusiasm and then move on to a new experience. They learn well from interacting with other people and like to be centre stage. They thrive on being thrown in at the deep end and can feel restrained by structures and policies. Activists are an open minded lot, but their thinking can lack longer term strategic considerations.

Exercises that are more passive or involve working alone will not engage the activist. Nor will workshops that repeat the same activity over and again. Precisely defined instructions may restrict their creative thinking.

Brainstorms and hands on interactive learning will suit the activist best. They will engage with short roleplays, especially those that put them at the centre of attention. Long presentations of set ideas will cramp their style!

**Pragmatists** want to take the theory and see if it works in practice. Like Activists they look for new ideas, but also for a chance to try them out and experiment with them. Send a Pragmatist on a course and they'll come back desperate to implement the new ideas that they've just learnt! Because of this they don't like long open ended discussions that don't seem to be getting to a practical point. They are innovators and problem solvers. If they can't see the obvious application, reward or relevance of an idea they may not engage with it. If there are no practical guidelines for how to do an activity, pragmatists will learn less well.

Exercises that have a clear link between the theory and a problem to be solved will best engage the Pragmatists. They will appreciate a clearly stated rationale for doing any given exercise. Pragmatists will benefit from being given an opportunity to try out and experiment with an idea, and from being given a "how to" model that they can use in their practice.

**Reflectors** are slow to make up their minds, needing time to ponder an idea and take on board many points of view. They will think deeply about any given subject before making a decision or forming an opinion. Their thinking will be based on sound analysis, and the thorough collection of information. They may sit back and observe discussion rather than engaging in it which can lead to them being thought of as shy, quiet, aloof or even bored. However this is how they do their learning and they will usually be far from bored – getting great satisfaction from observing others.

Reflectors learn from activities that involve the sharing of ideas, such as discussion groups, and from observation. They appreciate thinking time and having a chance to review activities.

They don't like tight deadlines, being given insufficient information, being thrown into an activity with little warning, or being made the centre of attention. Similarly they like to consider and reach their own conclusions so don't like being told how things should be done or being rushed through a series of activities.

**Theorists** are logical people that like to take information and systematise it into step by step theories. They like analysis and getting to the heart of the information – what are the basic assumptions or principles behind an activity? They can be very serious and don't always deal well with flippancy, subjectivity or lateral thinking exercises.

Theorists like being intellectually stimulated with concepts, systems and models. They like activities that give them a chance to methodically explore relationships between the ideas and the events. They will be interested in ideas for ideas sake, and unlike the pragmatist don't need the relevance or urgency to hold their attention.

They might struggle with activities that have no sound theoretical background, or are more concerned with emotions and feelings. They won't like being asked to make decisions without being given a context, concept or policy.

## The Role of the Facilitator

### Preparing For Workshops

Here are some thoughts on preparation that can help make your workshop participative, focused and enjoyable:

- **The workshop space must be chosen and prepared appropriately.** Ideally it should be comfortable, and set up to encourage participation. A circle of chairs works well – everyone can see each other and there is no automatic hierarchy in a circle. Make sure there's enough light, air, food & drink to suit the group. Are you competing with any other noise? Tea and coffee slow a workshop down, so if you want it short and focussed, it might be best to give it a miss, or wait until afterwards. Sitting round a table can help focus people.
- **Think about workshop times** – will people have to skip a meal to attend? Falling blood sugar leads to irritability and lack of focus, so have snacks on hand and plan to take breaks where needed. Will people need to leave in a hurry? If so make sure all important discussion or information is at the start of the meeting, or make extra sure you finish on time.
- **Prepare an Agenda** that considers learning styles and uses the best tools to get your learning outcomes met (see above)

## Facilitating Difficult Situations

As with meetings, a workshop can involve unexpected and difficult situations that need to facilitate your way out of! In many cases you can rely on exactly the same facilitation tools that you might use in a meeting.

The golden rule for effectively sorting out a difficult situation is to discover why it's happening – *what are the underlying causes?* Then you can figure out what you can do about it. So if you're ever unsure – ask the group what the problem is and actively listen to the answer!

### Working With An Unresponsive Group

Firstly, check whether they really are unresponsive. It's possible you've got a room full of reflective types that simply work at a slower pace than you'd planned. Then think about all the other possible factors. Do you need to take a break, open a window, do an energising game?

Maybe it's the exercise that you're doing? Have they understood what they're supposed to be doing? Have you given them a rationale for doing it, so that the pragmatic types can engage with it? Or perhaps it simply isn't working and you need to move on to something else? In all of these cases ask the group! If in doubt, throw it back to them. "Is everyone clear on what we're doing?", "Is this exercise working for you guys? If not we can easily move on".

If there's no energy for an exercise or workshop you might need to face the fact that you're not meeting the expectations of the participants – that what you have planned is not what they want to do. This may require

you to negotiate with the group – ask them what they were expecting and make some changes to your plans on the spot!

Of course it could just be Friday afternoon, or Monday morning. Blast them with your full repertoire of silly games – sooner or later they'll crack and start enjoying themselves, then they're all yours and the learning can begin. You could even try selecting icebreakers that are relevant to the learning you want to take place anyway...

### **Working With Sceptical Groups**

So you've got a group that's sceptical about the subject of this particular workshop? What do you do?

Firstly, make it clear what's in it for them. What advantages will the workshop bring them? Is it more knowledge, better exam results, simply an hour or so of fun?

Secondly, assume you've got a room full of Pragmatists who want to know exactly how each and every exercise is applicable to their real experience (and that includes the icebreakers!) – give them a clear rationale at the start for undertaking each bit of your workshop. If you can't (because, for example, the exercise needs them to come at it with an unprejudiced mind) explain that to them and make it clear that the rationale will become obvious.

Acknowledge the scepticism – don't just ignore it and hope it'll go away! You can be explicit – “I know some of you aren't sure how this workshop will help, but go with it for now – other groups have found it really valuable. Don't forget you'll get a chance to tell me what you think at the end. If you've got questions, or are unsure of anything at any stage, just ask me...”.

Trust in your workshop – you've checked that it meets all the needs of a good learning experience. You evaluate regularly, so know what works and what doesn't. Be confident – not easy when faced with scepticism – but do it anyway!

### **Expecting a Large Group, Getting a Small One!**

It's not uncommon to plan a workshop for 12 people and then find that only 6 show up on the day. Do whatever you can, in advance, to establish an accurate assessment of who will be there. If you think the numbers are at all unrealistic or vague, plan for half the number showing up. Check *out in advance* that your agenda will still work with 4, 6 or whatever. Assuming that you decide to go ahead with the workshop, what can you do?

On the positive side, a small group can mean a more intimate and interesting workshop – there's the potential for everyone to have more of a chance to speak and contribute, so see it as an opportunity and not a crisis! In many cases you simply need to mentally rework some of your numbers – e.g. 2 small groups instead of 4 or groups of 3 not 6.

But maybe you'd planned an exercise that you just don't see working with this number of people? Go back to the aims of the exercise – what were you hoping to achieve? How can you achieve those ends with this number of participants? It may mean you have to fall back on more traditional methods, such as brainstorms, go-rounds and discussion – so what? As long as you keep the energy of the workshop up, you'll get away with it, and the evaluations will show that your participants loved it!

The worst thing you can do is let the numbers deflate your enthusiasm. It will show and will infect the workshop! Don't sit there and say “Well, we were going to do this really interesting exercise, but since no-one could be bothered to show up, we'll have to do this brainstorm instead”!

You might need to sit in with the group more, and use questioning to elicit the breadth and depth of learning you were hoping to achieve through sheer weight of numbers (20 people brainstorming are likely to come up with more ideas than 5).

# Key Training Skills

## Presenting Information

- Do:
- Make it clear if, and when you're taking questions (otherwise an unsolicited question can throw you off your stride)
- Present at a pace that balances the time pressure of your agenda, and the need of more reflective/active learners
- Support the verbal with visual props and vice versa to reinforce learning
- Remember tone of voice, eye contact and body language are as important as the words you use
- Talk to the whole group, not just those at the front, and speak clearly!

### Don't:

- Misrepresent yourself as an expert if that's not the case
- Assume that the presentational bits of the agenda are boring and rush them or seem apologetic – some people thrive on them!

## Setting Up Exercises

### Do:

- Be clear on the purpose, timings and nature of the exercise
- Check with the group that they have understood the exercise
- Reinforce instructions with a handout/flipchart if need be. Would a list of questions to consider during the exercise be useful?
- Make yourself available for questions during the exercise

### Don't:

- Carry on regardless if you're not clear in your own mind
- Be afraid to restate the instructions, or call a halt if it's not working

## Small Group Exercises

### Do:

- Give clear instruction before splitting the full group into small groups – make sure they know what spaces they can use, how much time they have got etc.
- Once they're underway, check with each small group that they're OK with the exercise and know what they are doing

- Do small groups need to appoint a facilitator or someone to feedback? Make it clear in advance
- Vary the size and make up of your small groups throughout the workshop (unless you specifically want to build specific group or build teams)

### Don't:

- Let the same people dominate and report back from small groups

## Answering Questions

### Do:

- Throw questions to the group – “That's a really good question! Does anyone have an answer to it?”. Don't forget you can do this even if you do have the answer! Letting the group answer its own questions can enhance the learning

### Don't:

- Make it up. If you don't know, say so.

## Being Flexible & Responsive

### Do:

- Prepare in advance to avoid having to change agendas on the spot! Ask your participants what their expectations are (you could use a questionnaire in advance, or a simple go-round at the start of the workshop.)
- If you are meeting a very specific set of objectives that you have set, make them very clear in advance, reducing the chances of someone attending with the wrong idea!
- Co-facilitate – it doubles the facilitation experience in the room, and enhances the possibility of being able to respond to unexpected situations. On a practical note, one facilitator can carry on whilst the other prepares an exercise to meet any unanticipated needs
- Identify in advance which parts of your workshop you can adapt or cut out if time becomes an issue. Presentations take less time than interactive exercises, so you might need to adapt sections to keep them shorter. Prepare yourself mentally for this possibility!

### Don't:

- Pretend you can adapt your workshop on the spot if you can't! Be honest, and offer to deliver whatever the unexpected need was another time. Alternatively put the group in touch with facilitators that can meet their need. If you can, offer to send handouts/weblinks that will answer their questions. Then ask them to bear with you

for the rest of your workshop, and tell them what the benefits will be.

- Worry if you can't be flexible – flexibility comes with experience and confidence, and involves being willing to make mistakes. If you're new to training, no-one can reasonably expect that of you!

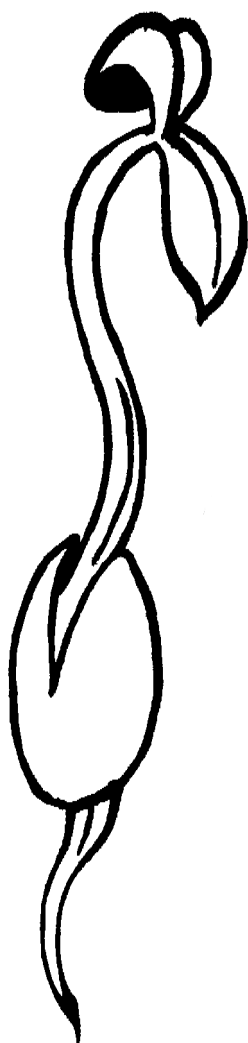
### Planning Workshops

Do:

- Start planning with your aims – what you want to achieve - and pick exercises to meet them. Don't start with your favourite exercises and let that dictate your aims!
- Check all your agendas against the basics of learning theory, e.g: Will it engage all learning styles?
- Be realistic about the time it takes to run through the agenda. If in doubt overestimate the time any given exercise will take
- Evaluate your workshop and modify your agendas in the light of experience

## Useful Resources

- [www.seedsforchange.org.uk](http://www.seedsforchange.org.uk) - a variety of resources on facilitation, including 'Tools for Meetings and Workshops'
- [www.carleton.ca/sasc/programs/campuslife/programs/leadership/development/Facilitating%20Workshops.doc](http://www.carleton.ca/sasc/programs/campuslife/programs/leadership/development/Facilitating%20Workshops.doc) - a brief summary of workshop facilitation



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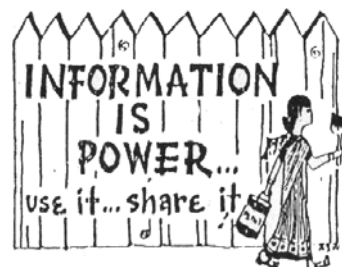
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