

## Establishing a Positive Learning Environment

It is your job as a facilitator to use whatever you have at your disposal to establish a learning environment of trust, respect, safety, integrity, and success.

### Create a Safe Haven for Learning

Some learners may arrive excited about the training. Some learners may arrive thinking that training is punishment or with memories of past learning experiences in mind. Yet others may arrive bringing their daily burdens with them. You can create a safe haven using some of these ideas:

- Be prepared early enough to greet participants immediately, welcome them, learn their names and allow time for them to tell you something about themselves.
- Share the objectives of the training early, prior to the session via email, learning management system, or social media tool if possible.
- Let participants know how they will benefit from the information
- Demonstrate your respect for each individual.
- Add something whimsical to pique curiosity and add a smile (for example, crayons, clay, koosh balls, or brightly colored sticky notes.)
- Use names and sincere reinforcement to build rapport.

Additional Ideas:

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### Create a Comfortable Environment

Arrive in the training environment early enough so that you can welcome the learners in as your guests. To create comfortable environment consider these actions:

- Turn the lights on bright. This creates a positive, upbeat environment.
- Learn how to adjust the thermostat for the most comfortable level for the most of the participants. Remember, you will never please all of them. Do your best.
- Ensure that the environment feels comfortable. Hide empty boxes. Straighten chairs. Place materials neatly at each seat. This tells the learner that you went to the trouble of getting ready for them.
- Have coffee waiting in the morning, and plan for ample breaks.
- Encourage participants in an online environment to have a comfortable environment for learning such as adequate lighting, comfortable chairs, headsets if they are participating in the audio portion via conference call, and refreshments.

Additional Ideas:

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### **Facilitate More than You Present**

There are few times when a straight lecturette is required. Perhaps when rules or laws must be imparted word for word or when your learners have no knowledge of the subject. But for the most part, facilitating enhances learning for everyone.

- Create discussion. Not just between you and the learners, but among the learners. You can encourage this in the online environment by using breakout rooms and the chat tool.
- Get opinions and ideas out in the open before you deliver your message. Ask questions before you make statements. You may be surprised at how much training the learners can do for you.
- Provide opportunities for participants to evaluate their own learning throughout the session.
- Create experiential learning exercises in which the learners realize their own aha moments!

Additional Ideas:

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### **Encourage Participants to Track Their Own Progress**

Tracking progress means celebrating success, overcoming obstacles, and deciding next steps. Set up ways participants can do these.

- Create individual program checkpoints.
- Build in group review of learning.
- Encourage participants to identify barriers to the learning.
- Pair individuals as sounding boards for one another. Encourage exchanges of ideas beyond the classroom using social media tools.
- Plan celebrations: certificates, team applauses, or moments in the sun.

Additional Ideas:

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## Facilitating, Training, Presenting: What is the Difference?

What is the difference between trainers, teachers, instructors, facilitators and others? What distinguishes learners, participants, trainees, and students? How about the difference between training, educating and instructing?

### Who's Who?

Let's first examine those who are delivering the training. You may have heard a number of different terms used – sometimes interchangeably. Let's differentiate between them. Note that these are generic terms and should be considered for guidance only.

- Facilitator:** An adult who ensures learners' participation; sometimes interchangeable with trainer, and often used to explain the role of facilitating learning. Used to describe a person who conducts teambuilding or strategic planning.
- Trainer:** An adult who is the learning catalyst for other adults to learn new skills and knowledge; often, but not always, the skills and knowledge are specifically to enhance the learner's performance on the job.
- Presenter:** An adult who delivers speeches at conferences or to larger groups; minimal emphasis on two-way communication.
- Instructor:** A teacher in academia.
- Teacher:** An adult who is instructing children; instructional.

How about those who are receiving the training?

- Learner:** A neutral term that can be used for anyone gaining information.
- Participant:** A general term used by trainers to refer to anyone in a learning session; a learner.
- Trainee:** Synonymous with participant; most recently has been replaced by "learner" or "participants."
- Student:** Someone in a formal education system, such as college or a young child in the school system; more pedagogical inference.

## Presenting: A Dynamic Delivery

Participants make judgments about facilitators based on what they hear and see. Document ideas about what a facilitator or trainer must do related to verbal and body language to create a positive tone to the delivery.

Hear	What can you do to create a dynamic delivery?
Volume	
Pitch	
Pace	
Pause	
Articulation	
Filler	
See	
Stance	
Movement	
Gesture	
Facial Expression	
Eye Contact	
Poise	

## Critical Techniques

Although a facilitator rarely is the central focus of a training session, the facilitator's role is critical from the beginning to the end and most of the time in between. Below are critical facilitator techniques at the beginning, middle and end. Imagine that you have just been selected to facilitate a group to come up with a list of top 10 facilitation techniques. What do you consider the most critical facilitator technique?

Establish objectives and how they relate to the participants.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Ensure that learners are participating in the way they desire

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Debrief every exercise, helping participants see the relevance and how to transfer the learning back to the workplace.

## 3 Types of Participants

- Vacationers
  - Motivated by fun.
  - They are all about living life to its fullest.
  - They might show up at meetings or conferences—but mostly for the benefits, like the free food. Vacationers act based on rewards.
  - It is good that they are there—but it is not for the right reasons.
- Prisoners
  - Driven by a sense of duty and responsibility.
  - If they attend a meeting or a conference, it is not because they want to. It is because they have to.
  - They do just enough to meet the requirements, and because of that, they will never reach their full potential.
  - They blend in with the crowd because they never really do anything worth noticing.
- Willing participants/learners
  - The people that are actively engaged learners.
  - They do not just do what is required of them, but they go above and beyond.
  - Why? Because they know that the hard work is worth it in the end.

## Engaging Participants

Engaging participants in their learning is a requirement for successful learning. So how does a facilitator ensure that learners are engaged, yet not wasting time? The key is to ensure that when you facilitate an exercise you follow it by debriefing the key learning that occurred and how it will transfer back to the job.

According to Robert Gagne, co-developer of instructional Design Systems, there are nine events of instruction:

1. Gain attention
2. Inform the learner of the objectives
3. Stimulate recall of prior learning
4. Present stimulus material
5. Provide learner guidance
6. Elicit performance
7. Provide feedback
8. Assess performance
9. Enhance retention and transfer

## Verbal Skills: <sup>1</sup>

### Facilitate conversation and discussion in a meeting or training

There are a number of basic techniques that a facilitator should be able to use confidently at meetings in order to facilitate discussions, engage participants and to make sure everyone is involved:

#### VERBAL TOOLS FOR GROUP FACILITATION

When facilitating a group conversation in a meeting or workshop, you can use a number of simple verbal tools to engage participants and to make sure everyone is involved.



##### Probing

Probing is used to determine the mood or general opinion of the group about a certain topic or point in the discussion. Just asking for a “thumbs up-thumbs down” survey can be enough to get an impression of the general opinion of the group.



##### Paraphrasing

Paraphrasing means to express the same content that was just stated before but in your own words in order to check that both you and the others have the same understanding.



##### Redirecting questions and comments

Redirecting a question to the group helps get participants more involved in the discussion. In addition, it also encourages group reflection.



##### Bridging and referring back

This helps the group follow the discussion and to connect ideas by recalling earlier discussions or ideas.



##### Shifting perspective

If the group gets stuck at some point in the discussion, try to shift the perspective and look at the problem from a different angle.



##### Summarizing

Repetition promotes understanding, and summarizing what has been discussed so far will help the group build upon the conclusions they have already made.



##### Giving positive reinforcements

It's important to encourage people, especially those who are less assertive, to state their opinions. Therefore, when someone brings up a good point, say so, thus showing his/her participation is appreciated, and later on he/she will feel confident enough again to bring up another idea.



##### Including quieter members

Encourage less talkative members to contribute to the discussion. Ask directly for their opinions and ask if they have any questions. At the same time, keep in mind that people do have different learning and thinking styles and may not feel comfortable if they are 'encouraged' too much.

<sup>1</sup> <https://www.sessionlab.com/blog/facilitation-skills/>

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- **Paraphrasing:** Paraphrasing means to express the same content that was just stated before but in your own words in order to check that both you and the others have the same understanding.
- **Redirecting questions or comments:** Redirecting a question to the group helps get participants more involved in the discussion. In addition, it also encourages group reflection.
- **Bridging and referring back:** This helps the group follow the discussion and to connect ideas by recalling earlier discussions or ideas.
- **Shifting perspective:** If the group gets stuck at some point in the discussion, try to shift the perspective and look at the problem from a different angle.
- **Summarizing:** Repetition promotes understanding, and summarizing what has been discussed so far will help the group build upon the conclusions they have already made.
- **Giving positive reinforcement:** It’s important to encourage people, especially those who are less assertive, to state their opinions. Therefore, when someone brings up a good point, say so, thus showing his/her participation is appreciated, and later on he/she will feel confident enough again to bring up another idea.
- **Including quieter members:** Encourage less talkative members to contribute to the discussion. Ask directly for their opinions and ask if they have any questions.. At the same time, keep in mind that people do have different learning and thinking styles and may not feel comfortable if they are ‘encouraged’ too much.



## The Power & Purpose of Elicitive Questions<sup>2</sup>

**Elicitive questions are about *eliciting* — *drawing out*.**

It is based on the idea that effective organizing helps people get what they want, helps people want what is consistent with their values, and clarifies and aligns their values.

*Elicitive questions* are an important tool for accomplishing all of this and can be used in training, organizing, facilitation, and almost any group process.

**Elicitive questions are not:**

- yes, or no questions.
- “why” questions that often stir up resistance or allow people to wax philosophical or invite rationalization
- long, complex questions that are hard to digest
- a way to trick someone into the “right” answer

**Instead, elicitive questions:**

- connect people more deeply with their own selves.
- create motion and options by assuming people have wisdom
- are short and simple.
- often ask the unaskable questions

**Examples of elicitive questions:**

- When you look at this plan, what excites you? What parts do you want to work on?
- Specifically, when has that happened?
- What parts of the proposal do you agree with?
- How could you imagine us working together?
- What would it take to convince you to...?
- How did you get involved in this work on XYZ (climate change)? What keeps you going?

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<sup>2</sup> <https://trainings.350.org/?resource=organising-with-elicitive-questions>

## Asking and Answering Questions that Lead to Learning

Read through the tips for asking and answering questions. Underline those you would like to incorporate into your own training.

### Tips for Asking Questions

- Plan some questions in advance.
- Increase participation by including them early in the session.
- Know why you are including them: create discussion, introduce a different perspective, correct response, review information, or offer a hypothetical comment.
- Keep questions short.
- Know whether you want opinions or information.
- Consider whether it should be an open- or closed-ended question.
- If asking a direct question, say the participant's name first, then ask the question.
- Pause for answers.
- Use follow-up questions to further clarify or expand the initial response.
- Paraphrase responses, especially when the response was not focused.
- Use a round robin response technique if you wish to hear from everyone.

### Tips for Answering Questions

- Anticipate participants' questions
- Inform participants of your expectations early in the session.
- Paraphrase questions to ensure that everyone heard and understood the question.
- Ask for clarification if necessary.
- Be brief.
- Respond "I don't know, but I will find out," when necessary
  - Make a note of the question and get back to that person, or the group, within a day or two.
- Redirect questions or encourage other responses from the entire group
- Invite the participants to discuss it at break if the question is not relevant. Post it on the 'Parking Lot.'
- Avoid showing your feelings to an argumentative questioner.
- Argumentative questions may need to be reworded.
- Include the entire audience in your response with body position and eye contact.

## **NOTES FOR PRESENTATION AND FACILITATION MODULE:**