A Presentation Skills Primer

Define PURPOSE: “Why Are You Delivering This Presentation?”
- What type of presentation are you expected to give: informal chat, seminar, case discussion, or a more formal presentation?
- Why does this group need to hear from you? Are you informing, persuading, or transferring knowledge?
- What are the desired outcomes you seek from participants? What behaviors do you want them to change or engage in as a result of your presentation?

Understand AUDIENCE: “Who Are You Presenting To?”
- How many people are expected to attend? What are the group demographics, including professional disciplines? Are they generalists or specialists?
- What knowledge base and experience do they have with your topic? What perceptions do they bring to the session? How likely are they to be interactive?

Research and Organize CONTENT: “What Do You Need To Cover?”
- What should be covered? What amount of detail is necessary? Will you be presenting novel concepts or building upon prior clinical knowledge?
- What must you say, and what must learners do, in order to achieve the established learning objectives?

- How much time has been allotted, including time for questions?
- How are you going to deliver your presentation? What equipment, materials, and assistance do you need to effectively convey your message?
- How big is the room, how will it be arranged, and how is the lighting level? Will you have to wear a microphone? Can you operate a computer and talk at the same time?

Types of Presentation Outlines

Cause/Effect
Describe how an event leads to another and explain outcome(s). Explain how concepts are related to each other.

Chronological
Give a sequence of events in the order they will, can or did happen.

Compare/Contrast
Explain how concepts are similar to, different from other familiar ones. Describe people, objects or situations to compare.

Journalistic Questions
Ask or propose answers to “what, who, where, when, why, and how” questions.

Narrative
Take the audience on a journey through a flowing presentation.

Problem/Solution
State a problem, propose solutions, summarize benefits of solution, discuss action points.

Topical
Divide a general topic into several subtopics.

Spatial
Follow linear logic based on location or direction.
Effective Communication Tips

**Language**
- Use precise, specific, concrete language appropriate to audience
- Address audience in second person (‘you’)
- Include stories, analogies, metaphors to reinforce key points
- Use humor judiciously, sparingly
- Avoid jargon, slang expressions and fillers (*er, um, like, you know*, etc.)

**Body Language, Expression and Movement**
- Speak directly to audience: avoid talking to ceiling, floor, or screen
- Make and maintain appropriate eye contact
- Keep hands free in order to gesture; use natural movements to emphasize topics
- Avoid excessive hand motions, touching nose or ears, and excessive coughing
- Slowly and on occasion, move naturally around the room to draw attention, add interest, engage and increase interaction with all learners
- Be respectful of individuals' defined levels of personal space
- Do not use a pointer, pen, pencil or chalk to point at an individual

**Voice**
- **Pace**
  Constantly vary pace in order to maintain audience interest: speak more quickly to convey enthusiasm; speak more slowly to emphasize key points or issues.
  Use breathing and natural pauses to slow down your pace.
- **Projection & Volume**
  Open your mouth fully and speak loud enough to be heard at the back of the room.
  Take slow, deep breaths, initiated from your abdomen.
  If you have a quiet voice, always ask for a microphone.
- **Articulation**
  Speak at a slower pace than normal conversational tone
  Enunciate clearly; pronounce each letter or sound within a word. Complete every sentence before starting on the next sentence.
- **Pitch**
  Adjust pitch for emphasis and to convey different meanings. Control breathing from your abdomen to alter pitch.
- **Inflection**
  Use upward inflections to ask a question, suggest uncertainty or doubt, and communicate hesitancy.
  Use downward inflections to give information and convey strength and authority to the audience.

**Handling Questions**
- Anticipate all kinds of likely questions and consider how you will respond. Practice answering difficult questions in advance.
- Explain to the audience the parameters of your Q&A session, e.g., when you will take questions, how you will recognize speakers. Politely but firmly request that any ground rules for asking questions be honored.
- Clearly point out logistics such as where to stand or what microphone to use when asking questions.
- It is appropriate – especially for novice presenters – to defer taking questions to a later point in the presentation, or simply ask the audience to hold all questions until the end of your presentation.
- Use effective group facilitation skills to maintain control of the process:
  - Keep Q&A focused on your presentation topic.
  - Formally recognize a questioner before they speak, allow only one person to speak at a time, and limit the number of questions.
  - Address responses to entire group.
  - Do not engage in an argument or lengthy discussion, or allow any questioners to dominate the Q&A session.
  - Discourage inappropriate questions.
**Step 1: Develop your central point.**

Know the presentation parameters and expectations. Consider these questions:

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
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</thead>
<tbody>
<tr>
<td>What is the fundamental purpose of this session?</td>
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<tr>
<td>What do I want the participants to learn?</td>
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<td>What is the shift in thinking or practice I want the participants to take away?</td>
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<td>How much time do I have?</td>
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<td>What’s the venue and setting like?</td>
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<td>What time of the day will the presentation happen?</td>
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<td>Who is the audience?</td>
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<td>What is their background?</td>
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<tr>
<td>What do they expect of me/us?</td>
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<tr>
<td>Why was I asked to teach?</td>
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<tr>
<td>What do I want them to do?</td>
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<tr>
<td>What learning modalit(ies) would be most appropriate for this group?</td>
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<tr>
<td>What visual medium is most appropriate for this particular situation and audience?</td>
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<tr>
<td>What’s the story in the learning objectives?</td>
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<tr>
<td>Most important question: What is my absolutely central point?</td>
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<tr>
<td>If the participants remember only one thing, what do you want it to be?</td>
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*Adapted from Garr Reynolds’ *Presentation Zen*
Step 2: Make it a sticky.

Decide on your objectives and learning modalities. Create a simple, unexpected, credentialed, concrete emotional story.

1. Simplicity
   Make your objectives simple and concrete. Provide access to high level concepts with simple words: like proverbs, the “Golden Rule” (Do unto others as you would have them do unto you).

2. Unexpectedness
   Use surprise, curiosity, sudden changes and twists in your story line. Open gaps in knowledge, drop clues, and then fill them in. Mystery! Intrigue!

3. Concreteness
   Use images and concrete elements.

4. Credibility
   Demonstrate your expertise and allow the audience to test ideas for themselves.

5. Emotions
   Make the audience feel something. Engage them into the story.

6. Stories
   Use focused and relevant stories to help the audience engage and create mental images of the ideas and concepts you are communicating. In clinical teaching, these are often compelling and illustrative patient stories.

What’s your story?

<table>
<thead>
<tr>
<th>Is it simple? If not, how would you make it simple?</th>
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</thead>
<tbody>
<tr>
<td>Unexpected?</td>
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<tr>
<td>Credentialed?</td>
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<tr>
<td>Concrete?</td>
</tr>
<tr>
<td>Emotional?</td>
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</tbody>
</table>

Concepts above are from Chip and Dan Heath’s Made To Stick

Step 3: Storyboard off-line.

Purpose: Turning off your computer and storyboarding off-line allows you to be more flexible and creative in putting together your presentation. You can play with lots of different ideas and choosing the best learning modality within given parameters before committing them to slides or digital visuals on your computer.

Methods and materials:
Turn off your computer and work with paper and pen or pencil to sketch out your ideas. Example options:

- Post-it notes: easy to change order and add or remove, then take a photo for reference
- Slide template with notes section: 3 slides per page plus an area to jot down key points
- Slide template with 6 or 9 slides per page
- Lined, graph or blank paper to freely sketch out your ideas
Step 4: Add visuals and fill out your storyboard on the computer.
Design matters! Good design enhances your communication and drives home teaching points.

1. Focus
   a. Use clear fonts
   b. Use high-impact visuals
   c. Stick with very dark text/images on light backgrounds or very light on dark.
   d. Use empty space to provide organization, clarity and focus
   e. Make your design clean and to-the-point

2. Repetition
   a. Make a master slide with a font and visual arrangement you’ll use throughout. This will provide a consistent look, unity and organization to your visuals.
   b. Make sure all your visuals and slides enforce and enhance your central point.

3. Alignment
   a. Use tables, text boxes or a grid to align elements to provide a clean look
   b. Group related items together

   • Avoid
     o Any non-essential elements
     o Lists (e.g. bullet points): they are much harder to remember than visuals
     o 3D effects
     o Animations that don’t directly add to your format and message

Step 5: Practice!
Practice at least once before you present to your target audience. If possible, present to someone who can give you feedback on whether you’ve been able to stick to your central point, make it sticky, and comment on your speaking skills, learning modality and visuals.

*Online resources:

Prezi: http://prezi.com/
Microsoft’s how-to guide and 12 tips: http://www.microsoft.com/atwork/skills/presentations.aspx
Garr Reynolds’ Top Ten Slide Tips: http://www.garrreynolds.com/Presentation/slides.html
Garr Reynolds’ Presentation Tips: http://www.garrreynolds.com/Presentation/index.html
Cliff Atkinsons’ First Five Slides webinar (background to creating your story, story board sketch and first set of slides; becomes more helpful around 10 mins into the video): http://beyondbulletpoints.com/the-bbp-basics-creating-the-first-five-slides/
Dave Paradi’s lessons from Al Gore’s An Inconvenient Truth presentations: http://www.thinkoutsidetheslide.com/articles/inconvenienttruth.htm
The AETC Trainers' Reference and Resource Manual

The most important thing that the Framework for Excellence represents is a commitment to some kind of formal process for training program planning and design. There are in fact many different models of instructional design, used by different types of training developers for different instructional purposes. The phases and steps may vary among different instructional design models, but the essential tasks are generally organized into interrelated processes represented here by the generic "ADDIE" model:

A Analysis
- Identify learners and understand their learning needs.
- Define learning gaps/problems and determine possible solutions.
- Develop understanding of learners' existing knowledge, skills, and expectations, and job requirements.
- Consider available learning methods, environments and logistics.
- Develop and delineate training goals to inform Design process.

D Design
- Develop desired learning outcomes and written learning objectives for each task to be addressed.
- Identify and plan strategies for specific topical content, presentation methods and media, interactive exercises and activities, and learner assessment criteria and tools.
- Choose training techniques and teaching methods and prepare written lesson plan outline, based on course format, and mode of delivery, and the time allocated for the training.

D Development
- Develop and produce all instructional materials, media and supporting documentation.
- Create interactive learning activities and instructions for completing them.
- Prepare training manuals, instructor's guides, participant manuals and handouts, and all necessary additional resource materials.
- Complete all logistical arrangements and pre-training outreach, marketing and promotion.

The "ADDIE" model is a generic instructional design model upon which many other approaches to training design are based.
Implementation
- Effectively and efficiently present training program and deliver instruction.
- Promote learner interaction and understanding of material in support of achieving the desired learning outcomes.
- Support learner transfer of knowledge to the job setting.

Evaluation
- Measure the effectiveness and efficiency of instruction.
- Gather and consider feedback from learners.
- Prepare and report performance results.
- Assess effectiveness of training content, delivery methods, teaching activities, educational materials, and learner resources.
- Make improvement changes for next program or presentation.

The diagram below illustrates some of the questions to be answered during each phase of creating a training program using the ADDIE model:

Creating a Training Program
Using the ADDIE Model

Needs Assessment
- What are the learners’ job-related needs?
- What existing knowledge do they have?
- What is the gap between what they know and what they need to know?

Training Implementation
- Are selected trainers ready to deliver the training?
- Are all training resources prepared and details regarding the training addressed?

The Adult Learner
- What do they expect?
- What do they need?
- How can training meet their learning needs?
- How can I as a trainer help them meet their learning needs?

Training Design
- What learning outcomes will meet learners’ needs?
- What kind of training plan needs to be created?
- What resources are available?
- What are some potential challenges to this training?

Training Development
- What content needs to be created?
- What appropriate activities need to be developed?
- What formative and evaluation instruments need to be created?

Evaluation
- Are the needs of learners being addressed in the design and development of the training?
- What methods are working/not working during implementation?
- How did learners evaluate the training upon completion?
- How will you determine if learners are applying their learning as they carry out job-related tasks?

From I-TECH Training Toolkit
http://www.gpo4tech.org

Asilomar September 2009 Version
<table>
<thead>
<tr>
<th>Methods and Common Usage</th>
<th>Features</th>
<th>Issues to Consider</th>
</tr>
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</table>
| Lecture/Speaker                                             | • Purpose is to clarify a large amount of information to a large group in a short amount of time  
    • Presents factual material in a direct, logical manner  
    • Can be adapted to all kinds of learners  
    • Useful for large groups: audience can be larger than is feasible for other methods  
    • Can precede more practical training techniques  
    • Trainer controls content, delivery and pace/timing  
    • May include use of visual aids, handouts, other illustrative materials | • Effective lecturers have both good presentation and group facilitation skills, including the ability to manage questions. Experts and guest speakers are not always good presenters or effective teachers.  
    • Emphasizes one-way communication: the audience role is mostly passive; minimal learner involvement  
    • Learning is generally more difficult to gauge  
    • Inappropriate for changing behavior or learning new skills  
    • Should include a variety of examples, anecdotes, and visual aids  
    • Avoid information overload: limit total time and content to maximize effectiveness and learner retention |
| Lecture/Presentation with Audience Discussion                | • Learning audience has opportunity to question, clarify and challenge in a more organized interactive format  
    • Presenters can give learners a structured listening assignment prior to the presentation  
    • Quality of training is largely influenced by the quality of questions and discussion | • Discussion questions should be prepared and rehearsed in advance  
    • Audience role is mostly passive; learner involvement is minimal without participant interaction  
    • Discussion may be limited by time constraints |
| Panel Speakers/Panel Discussion                              | • Allows experts to present different opinions  
    • Frequent change of speaker helps keep audience attention from lagging  
    • Adds variety to training and establishes or enhances credibility  
    • Stimulates more discussion than lecture | • Requires moderator with strong group facilitation skills  
    • Facilitator should coordinate focus of panel, brief and introduce panelists, and summarize discussion at end  
    • Expert panelists may not be good speakers; panelist personalities may overshadow content  
    • Audience role is mostly passive; minimal learner involvement |
# Common Training Techniques and Teaching Methods

<table>
<thead>
<tr>
<th>Issue to Consider</th>
<th>Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity: Should be followed by a housing or application.</td>
<td>Helps learners realize how much they know about a topic.</td>
</tr>
<tr>
<td>Allo ws sufficient time for processing and discussion.</td>
<td>Can be done individually, in pairs, or in small groups.</td>
</tr>
<tr>
<td>Group work: only on generating new ideas, not on evaluating existing ones.</td>
<td>Allows creative thinking for new ideas.</td>
</tr>
<tr>
<td>Maximizing participation: Sessions by spending time effectively.</td>
<td>Encourages creativity and cooperation with a group.</td>
</tr>
<tr>
<td>Group size: 5-10 minutes.</td>
<td>Reduce and eliminate on topic.</td>
</tr>
<tr>
<td>Help groups stay focused on the topic and avoid boredom.</td>
<td>One of the easiest ways to mobilize learners to think.</td>
</tr>
<tr>
<td>Requiring skill and experience to effectively facilitate.</td>
<td>Engaging participants.</td>
</tr>
</tbody>
</table>

Participants from all learners. Participation from all learners.|

| Problem-solving thinking for new ideas. |
| Simulation creative thinking for new ideas. |

| Draw out group. |
| Problem-solving. |

| Consensus. |
| Group work. |
| Against group. |
| Team work. |
| Help participants learn. |
| Critical thinking. |
| Small group discussion. |

| Consensus. |
| Group work. |
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<p>| Engaging participants. |
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</table>
| **Case Studies**         | ▪ Stimulates learners to define and seek solutions for actual problems encountered in work situations  
▪ Allows for exploration of solutions for complex issues  
▪ Highly participatory method of learning; learners are actively involved and can practice applying new knowledge and skills  
▪ Fosters the exchange of experience within learning group  
▪ Reactions to realistic and relevant cases often provide different perspectives and solutions to problems | ▪ Requires a lot of advance planning time to sufficiently prepare case study  
▪ To be most effective, a case study must be closely related to learners’ experience and relevant to their needs and concerns  
▪ Discussion questions need to be carefully designed  
▪ Instructor must have knowledge and skills required to present and work thorough the case study problems  
▪ Case-study problems are often complex and multifaceted; there often is not just one "right" solution or approach |
| **Role Play**            | ▪ Provides opportunity for learners to assume roles of others and appreciate other points of view  
▪ Active learner involvement by participants and observers in exploration of a realistic situation  
▪ Introduces problem situation dramatically  
▪ Participants can experience a real-life situation without having to take real-life personal risks  
▪ Stimulating and fun; engages learners’ attention  
▪ Roles can be assigned or participants can create their own roles; can be structured into dyad, triad, or fishbowl  
▪ Most effective when participants receive constructive feedback from assigned observer(s) | ▪ Requires strong group facilitation skills to give clear directions, establish a climate of trust, encourage participation, and help group to process and de-brief  
▪ Requires significant time commitment  
▪ Instructor must clearly define problem situation and roles and provide explicit instructions for conducting role play  
▪ Requires maturity and willingness of groups; learners must have a good understanding of their role for the role play to succeed  
▪ Learners may feel too self-conscious or threatened to participate actively in role play activities  
▪ Not appropriate for or effective with large groups; most effective when used with well-formed groups |
<table>
<thead>
<tr>
<th>Issues to Consider</th>
<th>Features</th>
<th>Common Use case</th>
</tr>
</thead>
<tbody>
<tr>
<td>Know each other a little better</td>
<td>Increase communication and allow people to get to know each other.</td>
<td></td>
</tr>
<tr>
<td>Opportunity to explore difficult and complex issues</td>
<td>Allows different introductions from other viewpoints.</td>
<td></td>
</tr>
<tr>
<td>郵件 effective when used with small groups of no more than 4 people</td>
<td>Encourage learners to reflect and explore personal beliefs in a safe environment.</td>
<td></td>
</tr>
<tr>
<td>Give clear instructions and permission to pass discussion opinions</td>
<td>Allows opportunities to explore and address values and beliefs where there is an emphasis on ethical or philosophical issues.</td>
<td></td>
</tr>
<tr>
<td>Discussion opinions to carefully prepare exercises and discussions to be recorded</td>
<td>Opportunity to practice what has been learned and reinforced content.</td>
<td></td>
</tr>
<tr>
<td>Leave space for results of small-group activities or behavior to be observed by the end of the lecture or activity. Give learners a clear idea of what they should know. Provide a clear set of objectives for each handout to discuss after the activity (e.g., must be prepared in advance).</td>
<td>Exercise and Grover Hands-on (activities, surveys, etc.) can be used.</td>
<td></td>
</tr>
<tr>
<td>Small groups require great degree of self-direction and must be planned in turn</td>
<td>Limited interaction allows quieter people to express productive responses.</td>
<td></td>
</tr>
<tr>
<td>Avoid repetition of each group saying the same thing twice that may be possible (e.g., for report-back).</td>
<td>Makes a larger training session more efficient and gives people a chance to reflect on experiences and give group feedback.</td>
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<tr>
<td>Keep groups small no more than 5 participants.</td>
<td>Allows for group discussion of one or two case studies.</td>
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<tr>
<td>Equal time for all contributions</td>
<td>Build on previous skills and experience.</td>
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<tr>
<td>Discussion questions/activities must be planned in advance.</td>
<td>In greater detail.</td>
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<td></td>
<td>Explore specific content.</td>
<td>Teach groups with reports.</td>
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<td></td>
<td>Systematic instruction and teaching methods</td>
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</table>
### Common Training Techniques and Teaching Methods

<table>
<thead>
<tr>
<th>Methods and Common Usage</th>
<th>Features</th>
<th>Issues to Consider</th>
</tr>
</thead>
</table>
| Videos, DVD Clips, Movies | - An entertaining way of teaching content and raising issues  
- Instructional video can help learners retain more information and understand concepts more rapidly  
- Useful for showing experiments or demonstrations that cannot be done in classroom  
- Helps learners practice critical observation skills  
- Reaches learners with a variety of learning and information acquisition styles  
- Learners can use new media technologies to create videos to share knowledge with peers | - Only effective when accompanied by post-viewing group discussion; facilitator must prepare discussion questions in advance  
- Facilitator should always provide introduction and debriefing; give learners specific things to look and listen for before they watch a clip  
- Passive learning for audience; discussion may not have full participation  
- Subject to equipment failure or malfunction – facilitator should set up and test all equipment before session  
- Copyright clearance may be required for some media |
| Demonstration | - Helps focus learner’s attention on critical aspects of task  
- Shows practical applications of a method  
- Involves learners when they try the method themselves  
- Opportunity to model specific/desired behavior or skill | - Requires planning and practice ahead of time  
- Requires accompaniment by discussion or lecture to give feedback to learners; feedback must follow immediately after practice  
- Demonstrator needs to have enough materials for everyone to try the method  
- Not useful in large groups |
| Simulation | - Practical, integrated learning experience  
- High involvement of the learner; learners are able to discover and react on their own  
- Allows instructor to control the training environment  
- Immediate feedback  
- Enables training and assessment in teamwork; situational awareness; behavior; and communication skills | - Requires significant time commitment  
- Requires advanced facilitator skill and preparation  
- Linkage between simulation outcome and real-world application needs to be clearly defined  
- Can be challenging to evaluate effectiveness of simulation as a teaching tool |
An A-to-Z List of Active Learning Techniques and Activities

General Considerations:
1. Adult learning principles and best practices can be learned – the evidence and techniques exist. Identify and create the learning opportunities and environments for applying them.
2. Teaching methods and training activities that require active learner involvement and the application of personal experiences are most conducive to effective adult learning. Draw on the experience and communication skills of training participants to make learning as active as possible.
3. There are many methods to choose from when deciding how to best deliver educational material – this is by no means an exhaustive or detailed list! The teaching methods and training techniques you choose should be consistent with the nature of your target learning audiences and what is expected of them, the complexity of the topic, and the amount of time you have for both preparation and presentation.
4. Some techniques and activities require more time, resources, or experience in leading than others.

<table>
<thead>
<tr>
<th>Technique/ Activity</th>
<th>Participation</th>
<th>Primary Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Self</td>
<td>Group</td>
<td>Direct</td>
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<tr>
<td>3 – 2 – 1 Assessment</td>
<td>◆</td>
<td>◆</td>
<td>◆</td>
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<tr>
<td>Action Idea Lists</td>
<td>◆</td>
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<tr>
<td>Active Listening Teams</td>
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<tr>
<td>Active Review</td>
<td>◆</td>
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<td>Applications Cards</td>
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<td></td>
<td>Self</td>
<td>Group</td>
<td>Direct</td>
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<td>Brainstorming</td>
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<td>Buzz Group</td>
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<td>Case Study</td>
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<td>Concept Maps or Models</td>
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<td>Creative Problem-Solving</td>
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<td>“Five Whys”</td>
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<td>Focused Listing</td>
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<td>Guided Notes</td>
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<td></td>
<td>Self</td>
<td>Group</td>
<td>Direct</td>
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<td>In-box Exercise</td>
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<td>◆</td>
<td>◆</td>
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<tr>
<td>Paired Discussion</td>
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A management simulation exercise used to teach priority setting, decision-making, and organization; learners are presented with correspondence or other job-related media typical of actual situations, then asked to sift through the information, decide what to do with each item, and describe why they chose that course of action.

Brief, time-limited exchanges between pairs of learners in response to a problem or question posed by the instructor. Learners discuss thoughts and share knowledge with each other before sharing responses with the entire group. To facilitate maximum discussion, give learners a specific task: "Have a discussion with your partner about..."; "Discuss the advantages and disadvantages of ..."; "Propose a solution for ..."; etc.
10 Tips When Facilitating Discussion

Your role during a group discussion is to facilitate the flow of comments from participants. Although it is not necessary to interject your comments after each participant speaks, periodically assisting the group with their contributions can be helpful. Here is a ten-point facilitation menu to use as you lead group discussions.

1. **Paraphrase** what a participant has said so that he or she feels understood and so that the other participants can hear a concise summary of what has been said.

   *So, what you’re saying is that you have to be very careful about asking applicants where they live during an interview because it might suggest some type of racial or ethnic affiliation. You also told us that it’s okay to ask for an interviewee’s address on a company application form.*

2. **Check** your understanding of a participant’s statement or ask the participant to clarify what he or she is saying.

   *Are you saying that this plan is not realistic? I’m not sure that I understand exactly what you meant. Could you please run it by us again?*

3. **Compliment** an interesting or insightful comment.

   *That’s a good point. I’m glad that you brought that to our attention.*

4. **Elaborate** on a participant’s contribution to the discussion with examples, or suggest a new way to view the problem.

   *Your comments provide an interesting point from the employee’s perspective. It could also be useful to consider how a manager would view the same situation.*

5. **Energize** a discussion by quickening the pace, using humor, or, if necessary, prodding the group for more contributions.

   *Oh my, we have lots of humble people in this group! Here’s a challenge for you. For the next two minutes, let’s see how many ways you can think of to increase cooperation within your department.*

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6. **Disagree** (gently) with a participant’s comments to stimulate further discussion.

   *I can see where you are coming from, but I'm not sure that what you are describing is always the case. Has anyone else had an experience that is different from Jim’s?*

7. **Mediate** differences of opinion between participants and relieve any tensions that may be brewing.

   *I think that Susan and Mary are not really disagreeing with each other but are just bringing out two different sides of this issue.*

8. **Pull together** ideas, showing their relationship to each other.

   *As you can see from Dan’s and Jean’s comments, personal goal setting is very much a part of time management. You need to be able to establish goals for yourself on a daily basis in order to more effectively manage your time.*

9. **Change** the group process by altering the method for obtaining participation or by having the group evaluate ideas that have been presented.

   *Let’s break into smaller groups and see if you can come up with some typical customer objections to the products that were covered in the presentation this morning.*

10. **Summarize** (and record, if desired) the major views of the group.

    *I have noted four major reasons that have come from our discussion as to why managers do not delegate: (1) lack of confidence, (2) fear of failure, (3) comfort in doing the task themselves, and (4) fear of being replaced.*
10 Suggestions for Improving a Lecture

Lecturing is one of the most time-honored yet ineffective ways to teach. By itself, it will never lead to active learning. For a lecture to be effective, the trainer should build interest first, then maximize understanding and retention, involve participants during the lecture, and reinforce what has been presented. There are several ways to do just that.

Building Interest

1. Lead-off story or interesting visual. Provide a relevant anecdote, fictional story, cartoon, or graphic that captures the audience’s attention.

2. Initial case problem. Present a problem around which the lecture will be structured.

3. Test question. Ask participants a question (even if they have little prior knowledge) so that they will be motivated to listen to your lecture for the answer.

Maximizing Understanding and Retention

4. Headlines. Reduce the major points in the lecture to key words that act as verbal subheadings or memory aids.

5. Examples and analogies. Provide real-life illustrations of the ideas in the lecture and, if possible, create a comparison between your material and the knowledge and experience that the participants already have.

6. Visual backup. Use flip charts, transparencies, brief handouts, and demonstrations that enable participants to see as well as hear what you are saying.

Involving Participants During the Lecture

7. Spot challenges. Interrupt the lecture periodically and challenge participants to give examples of the concepts presented thus far or to answer spot quiz questions.

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8. Illuminating activities. Throughout the presentation, intersperse brief activities that illuminate the points you are making.

**Reinforcing the Lecture**

9. Application problem. Pose a problem or question for participants to solve based on the information given in the lecture.

10. Participant review. Ask participants to review the contents of the lecture with one another or give them a self-scoring review test.
10 Methods for Obtaining Participation

Active training cannot occur without the involvement of participants. There are a variety of ways to structure discussion and to obtain responses from participants during a session. Some methods are especially suitable when time is limited or participation needs to be coaxed. You might also consider combining these methods. For example, you might use subgroup discussion and then invite a spokesperson from each subgroup to serve on a panel.

1. **Open discussion.** Address an unstructured question to the entire group. The straightforward quality of open discussion is appealing. If you are worried that the discussion might be too lengthy, say beforehand, "I'd like to ask four or five participants to share...." To encourage participants to raise their hands, ask, "How many of you have a response to my question?" Then call on one of the hands that are raised.

2. **Response cards.** Pass out index cards and request anonymous answers to your questions. Use response cards to save time or to provide anonymity for personally threatening self-disclosures. The need to state yourself concisely on a card is another advantage of this method. (See "Ten Occasions to Use Response Cards," page 19.)

3. **Polling.** Design a short survey that is filled out and tallied on the spot, or verbally poll participants. Use polling to obtain data quickly and in a quantifiable form. If you use a written survey, try to supply the results to participants as quickly as possible. If you use a verbal survey, ask for a show of hands or invite participants to hold up answer cards. (See strategy 14. "Instant Assessment," page 73.)

4. **Subgroup discussion.** Form participants into subgroups of three or more to share and record information. Use subgroup discussion when you have sufficient time to process questions and issues. This is one of the key methods for obtaining everyone's participation. (See "Ten Strategies for Forming Groups," page 23.)

5. **Learning partners.** Form participants into pairs and instruct them to work on tasks or discuss key questions. Use learning partners when you
want to involve everybody but do not have enough time for small-group
discussion. A pair is a good group configuration for developing a suppor-
tive relationship and/or for working on complex activities that would not
lend themselves to large-group configurations. (See “Tellt Assignments to
Give Learning Partners,” page 18.)

6. Whips. Ask each participant for a short response to a key question. Use
whips when you want to obtain something quickly from each participant.
Sentence stems (for example, “One thing that makes a manager effec-
tive . . .”) are useful in conducting whips. Invite participants to pass when
they wish. Avoid repetition, if you want, by asking each participant for a
new contribution to the process.

7. Panels. Invite a small number of participants to present their views in
front of the entire class. An informal panel can be created by asking
for the views of a designated number of participants who remain in
their seats. Use panels when time permits to generate focused, serious
responses to your questions. Rotate panelists to increase participation.

8. Fishbowl. Ask a portion of the group to form a discussion circle and have
the remaining participants form a listening circle around them. Rotate
new groups into the inner circle to continue the discussion. (See strategy
36, “Three-Stage Fishbowl Discussion,” page 130.) Use fishbowl discus-
sions to help bring focus to large-group discussions. Although time con-
suming, this is the best method for combining the virtues of large- and
small-group discussion. As a variation to concentric circles, participants
can remain seated at tables and you can invite different tables or parts of
a table to discuss the topic as the others listen.

9. Games. Use an enjoyable activity or a quiz game to elicit participants’
ideas, knowledge, or skills. Use games to stimulate energy and involve-
ment. Games also help to make dramatic points that participants seldom
forget.

10. Calling on the next speaker. Ask participants to raise their hands when
they want to share their views and request that the present speaker call
on the next speaker (rather than the instructor performing this role).
Use this method when you are sure there is a lot of interest in the discus-
sion or activity and you wish to promote participant interaction.

The Nuts and Bolts of Active Training
Techniques for Making Complex Material Understandable

For all, the following conditions apply:

1. Understanding complex material requires mastering prerequisite concepts first.

2. Proper diagnosis of the learning problem is required:
   - *Is it the Learner:* Weak in skills or basic knowledge? Remediation required?
   - *Is it the Teacher:* Weak in content or teaching skills?
   - *Is it the Content:* Poorly organized? Presented badly?

3. There is no standard of what is “complex” — good learner assessment is essential! The more you know about your audience – who they are, why they are there, what they need to learn, and how they will be expected to apply it – the easier it will be.

- **Teach creative problem-solving and challenge higher-order thinking** (analysis, synthesis, evaluation) through active learning (case-based methods, cooperative learning, problem-based learning.)

- **Justify:** Give learners a reason to listen to you. Why is this material important, and how will they use it? Show relationships that demonstrate how/why the material is important, relevant and useful.

- **Review:** Humans cannot remember everything they have learned instantaneously!
  Link new material to that previously learned to increase understanding and retention:
  - New vocabulary: review, define, give example.
  - Review previously learned content.
  - Review the concepts that are required to understand new ideas, techniques, guidelines.

- **Repeat and Give Examples:** People learn through repetition. Complete understanding is gained through ideas shown in a variety of contexts and applications, and connected to as many previously learned concepts as possible.
  Use a variety of examples that are clear, accurate, interesting, and transferrable:
  - **Easy examples** show how to grasp concept.
  - **Advanced examples** show uses of concept in different contexts.
  - **Boundary examples** show boundary of concept: the point where it no longer applies because a different concept takes over, or because research is currently active in that area.

- **Chunk it:** Break complex information down into small, manageable chunks to prevent information overload.
  Emphasize core concepts.
  - Keeping content segments in easily digested chunks makes information easier to learn:
    - Take a break every 90 minutes; change the pace of instruction every 20 minutes; give them something to do every 8 minutes.
  - Present complex content or instructions, then stop and allow time for processing.

- **Explain difficult concepts:**
  - Use analogies to help learners relate an unfamiliar concept to the familiar.
  - Use illustrations: abstract or unfamiliar concepts become more concrete to learners when presented visually – photos, diagrams, sketches, cartoons, other graphic images.
  - Use visual displays to depict the relationships between facts, terms and/or ideas within a learning task -- flow charts, Venn diagrams, concept maps, timelines, etc.

- **Use learner assessment techniques to check for understanding:**
  - Stop and ask for questions at regular intervals.
  - Have learners work in pairs/groups to explain concepts to each other.
What to Watch For

These pages are intended to be used as a guide for trainers and others who are observing trainers, and assessing their effectiveness as trainers. In order to evaluate a trainer in a way that is helpful to the trainer being observed, it's recommended that the observer attending the workshop fully participate in the workshop—that he or she ask questions, make comments, join in exercises and use this opportunity to learn what it is that the trainer has to teach. This approach gives the observer the experience of being a participant in the training, and it is this experience—what it actually feels like to learn from this trainer—that we are seeking to evaluate.

Overview: What to Watch for in Harm Reduction Training
The most important of the principles of learning which we rely on in harm reduction training is based on Albert Bandura's theory of social learning: the trainer must model the behavior being taught. This means that the trainer must not simply instruct participants on harm reduction principles, but must act upon these principles during the training; must show participants, through his or her actions, what harm reduction looks like in practice. It is this "modeling" which enables effective learning. The following are some of the other tenets of effective learning which have relevance to harm reduction training:

Effective learning occurs when...

- Learners are treated with respect
- The tone of the training is collaborative, rather than authoritarian
- The expertise of the group is acknowledged, and tapped
- Learners help to determine their own training needs
- The training goals are clearly stated and agreed upon by the group
- New material is introduced at a rate which allows people to process new information
- Learners are encouraged to question and challenge
- Learners are given the opportunity to test new skills and hone existing ones
- The training format is varied
- The training content is responsive to the needs of the learners
- The physical environment is comfortable
- The trainer knows the subject well and communicates it clearly
- The trainer acknowledges, rather than ignores, the institutional politics and policies that constrain the learners.

Skill Checklists
The following pages provide checklists which are divided up by the following skill areas:

- Platform skills
- Group management skills
- Adult learning skills
- Group facilitation skills.
Each of these skill areas overlaps with the others, each is defined for the purpose of this evaluation at the top of each page. The participant/observer may choose to use these pages as an actual evaluation tool, checking off which strengths each trainer exhibits, or may use these pages just to familiarize him or herself with what to look for, and use the normal participant feedback form to report his or her evaluation.
Platform Skills

These are the skills that affect your style and delivery as a trainer

Voice

☐ Speaks loudly enough to be heard
☐ Modulates tone and pitch (not monotonous)
☐ Shows enthusiasm/passion/conviction/interest
☐ Talks to the group
☐ Repeats the same thing in several different ways, in order to emphasize a point and in order to ensure that people with different learning styles are reached with the message
☐ Pace the presentation using voice (e.g. speak faster to show enthusiasm and slower to emphasize key points or issues.
☐ Good projection and volume/loud enough to be heard at the back of the room
☐ Good articulation: enunciating clearly
☐ Adjusting pitch for emphasis and to convey different meanings
☐ Used upward inflections to ask a question, suggest uncertainty or doubt or communicate hesitancy
☐ Used downward inflections to give information, convey strength and authority to the audience

Eye contact

☐ Makes and maintains appropriate eye contact
☐ Speaks directly to the audience: avoid talking to the ceiling, floor, screen or over learner’s heads
☐ Watches the non-verbal cues of the participants (senses when the group is getting bored, for example, and responds, rather than ignores the situation)
☐ Seems aware of facial expressions
☐ Acknowledges a raised hand, even if the person cannot be called upon right away
☐ When co-training: pays attention when his co-trainer is 'on', looks interested, engaged with both his co-trainer and with the group

Body Language, Expression & Movement

☐ Feet are firmly planted on the ground
☐ Limits distracting movements and nervous habits
☐ Crosses the "imaginary line" into the group for emphasis
☐ Doesn't talk while turning, with her back to the group, or into the flipchart
☐ Pulls up a chair and sits with the group in order to facilitate group discussion
☐ Uses gesture to illustrate points
☐ Uses audiovisuals smoothly
☐ Keeps hands free in order to gesture; use natural movements to emphasize topics
☐ Avoids excessive hand motions, touching nose or ears, and excessive coughing
☐ Moves around the room naturally to draw attention, add interest, engage and increase interaction with all learners
☐ Seems mindful and respectful of different individuals defined level of personal space.
Dress

- Appropriately dressed for the event, audience, and venue. Not overdressed or underdressed
- Dressed in a way that does not detract or distract

Silence: an Essential Tool

- Uses it for emphasis
- Pauses to give participants time to think
- Is patient and allows participants to respond to one another
- Uses silence to avoid coming up with "all the answers"
- Allows the group to summarize experiences
- Doesn't insist on having the last word
- Refrains from responding verbally after each participant comment, in order to encourage the members of the group to speak to each other, rather than speak only to the trainer

Language

- Uses precise, specific, and concrete language that is appropriate for the audience
- Avoids jargon, slang expressions, and fillers (e.g. er….um….like, you know, ok)
- Uses the words "we" and "us," instead of "you" ("How can we serve our clients better?")
- Includes stories, analogies, and metaphors to reinforce key points.
- Knows the correct pronunciation of each word used, including medical terms
- Avoids using words that hold hidden values (drug abuser, AIDS patient)
- Is aware of terms that may not unfamiliar to the audience, and defines them simply
- Uses humor appropriately, judiciously and sparingly.

Engages the Group

- Learns and uses participants' names
- Asks open-ended questions
- Never asks, "Any questions? Instead, asks "What questions do you have?" or "Who has comments/an opinion on this?"
- Validates contributions made by participants
- Connects comments to contributions made earlier
- Paraphrases in order to clarify and validate comments
- Avoids unintentionally shutting down discussion with closed questions
- Shifts activities when the group seems tired, bored or overwhelmed.
**Group Management Skills**

The skills the trainer uses in order to create a comfortable learning environment

**Preparation**

- If appropriate, a confirmation is sent to all trainees to confirm their participation
- Trainer arrives before participants with all materials and sets up the room, computer, and training materials, as needed.
- Makes any changes in the room which need to be made, including such things as room temperature, room set-up and comfort of the seating
- Has written or online materials available for participants
- Do a dry run of the presentation to ensure timing works and there is comfort with the material.
- Preview the tools being used to make sure it works (e.g. slides, ARS, videos, or other technology).
- Has time to become familiar with the venue the location of bathrooms, smoking area, local restaurants, etc.
- Greets and welcomes participants as they arrive, introduces her/himself
- Takes responsibility for any problems which might affect group comfort, never blames others
- Is well organized and prepared for the training
- Anticipate and think about how what is being taught is affected or influenced by culture

**Delivery**

- Reviews logistics/housekeeping details with participants at the start of the training
- Sets group agreements with the group for a workshop of longer than 3 hours
- Sets, communicates and adheres to time boundaries
- Communicates goals of the presentation
- Elicits expectations from the group/does an informal impromptu needs assessment as needed
- Seems comfortable speaking to a group
- Has well-designed slides or materials
- Is a credible presenter who has experience and knowledge about the topic
- Tells group whether or not those expectations will be met
- Elicits feedback from the group about decisions which affect the group
- Helps the group to make decisions by making clear what choices are available
  - Example: "Would an hour for lunch be enough? Or do we need an hour and 15 minutes? Either way, I believe we can end at 4:30."This is more helpful to the group than, "How long would you like for lunch?"
- Adjusts agenda to meet group needs
- Responds appropriately to disruptive participants, arguments, glitches and snafus
- Good projection and posture
- Good pacing of training with pauses Introduces new material at a good pace, neither too
quickly nor slowly

- Introduces new material at a good pace, neither too quickly nor slowly
- Gives clear instructions to exercises
- Uses appropriate and relevant examples to illustrate points
- Sets up exercises and transitions to small group work in such a way as to minimize confusion and disruption
Adult Learning Skills

The skills the trainer uses to communicate new information, explore attitude change, and impart new skills

- Presents subject matter in a variety of different ways, in order to be accessible to people with different learning styles
- Uses audio-visual resources effectively
- Allows time for participants to read the entire slide or overhead
- Provides written materials to the group which relate directly to training content
- Assesses knowledge level of the audience
- Uses a variety of instructional aids and methods
- Limits non-interactive lecture to no more than 15 minutes at a time
- Communicates respect for and interest in participants' viewpoints
- Acknowledges wisdom and experience of the group by encouraging dialog amongst peers
- Draws on knowledge of group members
- Allows time for group discussion of exercises and for a diversity of opinions to be aired
- Summarizes key points of discussion
Group Facilitation Skills

The skills the presenter uses in order to help the participants take on the responsibility for learning and discovery

- **Redirects questions or comments to other members of the group**
  
  "That's an interesting thought. Any reactions?"
  
  "You're talking about the morality of providing clean syringes. "Who here has thoughts on that?"

- **Connects comments to contributions made earlier**
  
  "I think that supports the point that Margaret brought up..."
  
  "That goes along with what Raul was saying earlier about how our own attitudes can get in the way of working effectively with our clients ..."

- **Validates contributions from the group**
  
  "Good point Jose, thank you."
  
  "It's good that you brought that up, because I forgot to mention it, and it is important."
  
  "I'm glad you mentioned that, because there's a lot of confusion about what are really the most 'dangerous' drugs."

- **Paraphrases for clarity, and in order to validate**
  
  "Let me see if I understand you. You're saying..."
  
  "So, from your point of view harm reduction is something that social workers have always done..."

- **Uses open-ended questions**
  
  Open-ended questions (as opposed to closed questions) cannot be answered with a simple "yes" or "no". Because they do not imply that there is a single, or "right" answer, they open group discussion, rather than shut it down.

Examples of open and closed questions

Closed: "Are there any questions?"   Open: "What questions do you have?"

Closed: "Anyone else have comments?"   Open: "What other comments are there?"

- **Helps the group keep the discussion on topic**
  
  - **By using the "paraphrase and add-on" technique:**
    
    "It sounds like many people here have had personal experience with drugs, and close relationships with drug users. Here's the question before us: what are the differences between the way drug users are treated in traditional drug treatment programs and the way they are treated in Harm Reduction programs ..?"

  - **By using the "paraphrase and I-statement" technique:**
    
    "It sounds like many people here have had personal experience with drugs, and close relationships with drug users. What I want to know is this: what is your perception of the difference between the way drug users are treated in traditional drug treatment programs and
the way they are treated in Harm Reduction programs ..?"

- **By directly asking people to return to the original topic**
  "We are talking about how poor supervision keeps us from being able to do our jobs well, and this can be very frustrating. But let's return to our original topic: what else do our clients need from us?"

- **By directly making the connection between the current topic and the original topic**
  "That last comment relates to what we were talking about earlier-factors that keep us from treating our consumers with respect and dignity. What else keeps us from doing our jobs as we would like to do them?"

□ **Helps the group stick to its ground rules or group agreements**

- When the conversation gets heated, the facilitator helps the group avoid insults, interruptions and disruptive side-conversations by reiterating group agreements or establishing new procedures
  "Things are getting heated now because this is a hot topic. But we agreed to speak one at a time. Cheryl has had her hand up for a long time, then I'll ask you to speak in this order: Mark, Janine, Paul, Marjorie"
Roles of Facilitators

◊ Facilitators are the standard-setters for the discussion. Facilitators must stay focused and alert, interested in the discussion and the learning that is taking place. They create the standards of communication, by looking around the room at all participants, listening closely, and encouraging all participants to contribute to the group.

◊ Facilitators make the workshop environment a priority. Everything from how the chairs are set up, candy, quotes on the wall, location of restrooms, and many other logistical items. The facilitator is responsible for gauging the physical environment of the training and how the environment relates to the feeling of the workshop.

◊ Facilitators are mindful of timing issues. It is easy to over-schedule activities and not incorporate enough downtime for the participants. Avoid planning intensive activities directly before or after a meal. Always plan for activities taking longer than you think they will last. Facilitators need to constantly check-in with the group to gauge their energy level.

◊ Facilitators are responsible for articulating the purpose of the discussion and its significance to the group. It is important to clearly state the goal and purpose of each activity and section of the training. Also, let the group know the expected time that will be spent on each activity.

◊ Facilitators make use of various techniques/tools to keep the discussion moving when tension arises or discussion comes to a halt. The facilitator must be prepared with tools to keep the learning happening.

◊ Facilitators are responsible for paying attention to group behaviors. You to be observant of verbal and non-verbal cues from the group. You can encourage people to explain their behaviors during check-in periods.

◊ Facilitators should be relaxed and have a sense of humor that makes sure discussions are enjoyable as well as educational. Group discussions can often take a very serious turn and become intense. It is important to remember we do not have to be fired-up or uptight in order to have effective discussions. Laughter and a relaxed environment can be the greatest methods for a good discussion.
Effective Behaviors

Collaboration begins with working together. Facilitation is basically a way of guiding a group to work together. Most situations can follow a process of opening, narrowing, and closing. This can happen in one session or over time.

Penny Wise...Pound Foolish. Be certain to use your preventions (and decrease your need for interventions).

Implementable decisions are made up of a series of small agreements. There is no one right way to facilitate, although there are some generally more effective ways to use certain techniques. Collaboration and facilitation are heuristic processes.

Keep your eyes on the goal. Facilitators are flexible while keeping eyes on the objective at each strategic moment.
Cooperative Learning
Roles

Cooperative learning has many different roles for team members during group activities. In groups of four, one person should take both the timekeeper and observer role. In groups of three, another person should take both the recorder and reporter roles. Make sure to assume a different role each time you work in a cooperative learning group. Group members should take turns, so everyone gets a chance to experience each role.

- **Facilitator** - the person responsible for organizing the work of the group, and being sure the group stays on task.

- **Recorder** - the person who takes notes, writes on newsprint as the group brainstorms, and/or prepares the newsprint.

- **Reporter** - the person who shares with other teams the work or conclusions of the team.

- **Timekeeper** - the person who assures that the team is able to devote appropriate time to each assigned task and complete all its tasks within the allotted time; this role is especially useful when the team has a tight deadline.

- **Observer** - the person who watches the interaction of the group members and reports on difficulties or successes in group interaction.
Behaviors for Facilitators to Avoid:

- Downplaying people's ideas
- Pushing personal agendas and opinions as the "right" answer
- Dominating the group
- Saying umm, ahhh
- Reading from a manuscript
- Telling inappropriate or offensive stories
- Making up an answer-you never know who is in the room
- Allowing people to bully others in the group
- Taking a stance with one section of the group
- Telling too much about your personal experiences and life-keep a healthy balance-you are seen as the leader in the room
- Assuming the demographics of your group

Basic Tips for Facilitators:

- Know your audience BEFORE the training-their educational backgrounds, ages, work/service environments, expectations. Survey the participants to see if they need special accommodations for the training (e.g., American Sign Language interpreter, wheelchair ramp access).
- Exude confidence-be clear, enthusiastic, breathe!
- Use humor, stories, and examples that directly relate to their work.
- Evaluate needs of the group, especially at the end of the day to see what you can change for the next day. Consider using the +/- method (found in the handout section of this workshop).
- Select an appropriate activity that will meet the needs of your group and have lots of fun energizers/icebreakers on hand.
- Have lots of visually appealing handouts and flip charts-they help add the practical material the participants leave your workshop with.
• Determine needed supplies, room requirements, chair set-up.

• Think through the exercise and visualize potential problems and pitfalls— one of the biggest is not allotting enough time for activities.

• Clearly explain activity directions and be prepared for questions.

• Observe individual participation and involvement during exercises.

• Be aware of individuals that may be experiencing discomfort or are not participating.

• Follow up the exercise with discussion.

• Processing will reveal the thoughts and feelings never expressed previously.

• Be available to talk/ debrief with participants during break times and before/after the training.

• Evaluate the experience and write down notes for future trainings.

Programmatic Facilitation Tools:

There are certain steps you will want to take when you are facilitating trainings. We listed them below. As you become more experienced, you will add your own personality to the following items. Observe other facilitators and see how they facilitate their trainings.

Design the Training with Various Teaching Methods: No one learns or retains information the same way. Therefore you need to have a bunch of different ways you demonstrate and teach the methods in the training. According to the National Training Laboratory, research shows the following average retention rates for different training methods:

5% Lecture
10% Reading
20% Audio-Visual
30% Demonstration
50% Discussion Group
75% Practice by Doing
90% Teaching Others

Eye Contact: Move towards the participants when they are speaking to indicate your interest and respect to what they are saying. Make sure you have good eye contact at all time. Look around the room and make eye contact with each person, while you are talking, for at least 5 seconds.
Cooperative Learning Roles: The roles should be posted on flip chart paper in the room and explained to the group before the training starts. Explain that when they are broken into small groups to perform an activity (not an icebreaker), they should use the cooperative roles. Make sure the participants rotate roles. See the handout section for an explanation of the roles.

Introduce Facilitators: Plan to welcome everyone to your training by telling them about yourself and other facilitators. Say your name, your role in the training, your experience on the topic, fun stuff about yourself, and any mistakes you may have made in the past on the topic that will bring smiles or learning for the group.

Fist to Five Consensus Building: When a group comes to consensus on a matter, it means that everyone in the group can support the decision. They don’t all have to think it’s the best decision, but they all agree they can live with it. To use this technique, the facilitator restates the proposal/idea and asks everyone to show their level of support. Each person responds by showing a fist or a number of fingers that corresponds to their opinion. It is a good idea to post what each finger means so everyone knows exactly what they are representing.

Fist- a no vote. A way to block consensus. "I need to talk more about the proposal and require changes for it to pass."
1 Finger- “I still need to discuss certain issues and suggest changes that should be made.”
2 Fingers- “I am more comfortable with the proposal but would like to discuss some minor issues.”
3 Fingers- “I’m not in total agreement but feel comfortable to let this decision or proposal pass without further discussion.”
4 Fingers- “I think it’s a good idea/decision and will work for it.”
5 Fingers- “It’s a great idea and I will be one of the leaders in implementing it.”

If anyone shows fewer than three fingers, he or she should be given the opportunity to state objections, and the team should address these concerns. Teams continue the Fist-to-Five process until they have achieved consensus (a minimum of three finders or higher) or determine they must move to the next issue.

Prioritizing Your Group’s Ideas: Choose one of the following techniques when you need to have your group make a decision based on several options.

N/3- each participant gets as many votes as the total number of proposal items divided by 3. People can not stack their points.

Assigned Points- Each participant gets an assigned number of votes and can stack points.

Working Agreements/ Group Rules: Developing ground rules or working agreements helps frame the training and gets everyone on the same page as to group norms and expectations. You can start out by asking the group "what agreements would
we like to have to ensure a positive learning environment?" Have people list ideas on flip chart paper. Ensure everyone is comfortable with the agreements/rules written down. Then have everyone sign their name to the paper. The facilitator closes by stating, "this is an organizational agreement. We may need to add agreements as the training progresses." Keep the agreements/rules in a highly visible place. This is great technique to use if the group is not following one of the agreements. For example, if one of the agreements was to "start on time" and after meals the majority of the group comes 5 minutes late, the facilitator can then remind the group we all agreed to start on time and when people are late it breaks one of our working agreements. The facilitator can also develop a list of agreements/rules to follow throughout the training. See the handout section for an example.

**Ensuring Access:** Survey the training location and room before the training. Ensure there is adequate lighting, parking spaces, elevators, wheelchair ramps, etc. Notify the participants ahead of the training if there are things they need to be aware of to make access to more available. Make sure break necessities—bathrooms, water fountains, pay phones—are in working order. If you do have participants with wheelchairs, take away some chairs so they have a place at the table.

**Games and Icebreakers:** These games are crucial for setting the tone of the training. Many icebreakers are in the handout section of this workshop.

**Subdividing Groups:** It is inevitable that in some part of the workshop you will need to break a large group into smaller groups. There is a list of ways you can subdivide a group in the handout section. A favorite is to have a bowl with pieces of paper in it that have different animals on each piece of paper. The animals should all have equal representation in the bowl (i.e., if you have 5 cows, you must have 5 pigs). Each participant selects a piece of paper out of the bowl and when the facilitator says "go" everyone should then start miming their animal's sound (e.g., cow= person saying moo). Tell them to find their fellow animal friends and this is the group they will work in for the activity.

**Elicit Expectations of the Group:** Before you go into the content of your workshop, ask the participants why they came to this workshop, what do they want to learn, etc. and write their responses down on flip chart paper. Then go through each statement and say whether or not that will be covered in the workshop. Be honest, if it will not be covered clearly say why not and that they can get more information from you or direct them to another workshop that may better suit their needs.

**Stacking:** When your group is in a discussion and many people have their hands raised, use the technique of stacking. Write the people's names in order of them raising their hands so they do not have to keep their hands up and you do not have to remember who is next.

**Handsignals:** Create some handsignals that everyone agrees on before the training. For example, if you need the room to quiet down you would put bunny ears over head. If you need the person to close their point you would roll your hands in a circle.
**Stress Relief:** At times the discussion can be heated. When this happens have the group sing a funny song, tell some jokes, give back rubs in big circle, take a moment to sit in silence to reflect on other’s comments, or breath deeply to get focused.

**Prepare Handouts and Flip Charts:** Before the training, prepare as many flip charts and have all your handouts copied. Use bright colors and images for your flip charts. In the handout section you will find tips to make your flip charts visually appealing.

**Talking Stick:** If you have someone who is dominating the discussion, perhaps you could give them a non-speaking role in an activity. You can also avoid people speaking over one another by having a symbolic talking stick- you can use a koosh ball, rain stick, etc.

**Responding to Challenging People:** It is inevitable that you will face people in the group that challenge you or are blocking what others are saying. In general you need to address the behavior-not the person-when handling a challenge from one or a few individuals. Try to establish responses that you memorize and can pull out of your head to respond when people are being difficult. NEVER seem negative or that you are treating someone unjustly, this will affect the whole learning environment, making the participants feel uncomfortable.

**Responses to challenging people that you can use:**

- Would you see me at the break to discuss this point further?
- That is an interesting dilemma, perhaps we can discuss this over lunch.
- You are very knowledgeable about this topic. Thank you for sharing another perspective.
- Actually, for this presentation I pulled resources from...
- I hear 3 questions. Let’s deal with one question at a time. (then repeat the questions you heard them ask to check for clarity)
- Thank you for asking. I must not have been clear before. Let me try to explain the concept in a different way.

**Getting the Groups Attention:** When you are attempting to get the groups attention and get them focused, try one of the following techniques.

- **Clapping:** The facilitator says “If you can hear my voice clap once.” If that does not work they continue, “If you can hear my voice clap two times.” If that does not work they go onto three times. The group typically catches on after three claps.

- **Lights Out:** Turning off the lights or flicking them on and off is rather grade schoolish, however it does get the group’s attention.

- **Silence:** The facilitator can simply stand in the front or middle of the room in silence until the group realizes what is happening.
Raising Your Hand: The facilitator can simply raise their hand and stand in silence until everyone else raises their hands and is silent.

Put up a Parking Garage: Items and questions will come up during the training that may not be relevant to the content of the training at that particular moment. Therefore, in order to listen and keep everyone engaged, place a piece of flip chart paper on the wall that says “Parking Garage.” In the beginning of the training explain that if a question comes up during the training that you can deal with at that time, we will place it in the garage so we do not forget about the question and so that we can designate time to discuss the question or idea.

Gifts/Tokens: It is fun for trainers to have “stuff” to give to the participants of the workshop. Some facilitators have candy out, others choose to have food and drinks. There is also creative stuff to give participants. See the handout section for a list of items you could give to your training participants.

Ouch Rule: Before you get started, perhaps as you are introducing yourself, explain to the group you have an “ouch rule” in effect. If at anytime during the training you or a group participant says or does something that is offensive, you can raise your hand and say: “ouch, that hurt” and explain what happened.

Vibeswatcher: A role you can give a facilitator is to watch the group process. They are aware of the underlying feelings, check body language, stops negative group process (e.g. put downs, domineering), helps resolve conflicts, suggests different tools when the group gets stuck, and deals with outside distractions.
Plus/Delta: A Method of Debrief and Closure

At the end of an activity or as a check-in during the day and at the very end of the day, the facilitator asks the group to discuss the entire training from the room set-up, atmosphere, content, flow, etc.

The facilitator first asks for the pluses, then the deltas (Greek word for change). It is critical to explain that this is not what is good and what is bad. This is a method for highlighting what went well/what worked and what needs to change so learning is taking place.

An example of plus/delta after a training on children's literacy:

<table>
<thead>
<tr>
<th>+ The things that worked</th>
<th>? Changes for the future</th>
</tr>
</thead>
<tbody>
<tr>
<td>♦ Scavenger hunt with kids books</td>
<td>♦ Room is too cold</td>
</tr>
<tr>
<td>♦ Making book folders</td>
<td>♦ More water and drinks</td>
</tr>
<tr>
<td>♦ Learning how to select books for kids at different reading levels</td>
<td>♦ Provide clearer directions before the activities</td>
</tr>
<tr>
<td>♦ Facilitator's humor</td>
<td>♦ Give more time for small group work</td>
</tr>
</tbody>
</table>
What Can Go Wrong: What to Do About It

Even under the best of circumstances, certain problems may occur. As the facilitator, if you are aware of problems as they arise and are prepared to deal with them, you can usually prevent them from marring the session. There are a number of things you can do when you recognize that a problem exists. One is to do nothing. It is not always possible or necessary for the facilitator to cure every minor ill that the group suffers. You may decide that a particular problem is not serious and if left alone may disappear or be handled by other members of the group.

However, if you judge that a situation threatens the group's functioning; you may decide to take action in several ways. Discreetly dealing with the problem yourself is sometimes the answer. You might do this by taking the individuals involved aside for a private discussion, by changing your own facilitation style, or by changing the agenda. Other times, it may be best to include the whole group in dealing with the problem. You can often get them to do this by describing how you perceive the situation and/or soliciting others to describe their perceptions. This can encourage some participants to suggest solutions. If no one volunteers a solution, you can ask for suggestions, or you can make suggestions of your own. Sometimes just making the group aware of a problem (such as a discussion getting off track) will be enough to get the problem under control.

Don't let problems frighten you. It is very rare for a group meeting to proceed absolutely perfectly and problems are not necessarily indicators of poor facilitation on your part. The facilitator's job is to be cautious of incipient problems and to help the group control them. Following are descriptions of some classic difficulties and some suggestions for handling them. At the end of the chapter is a summary of general principles that should guide you in preventing and handling problems.

I. WHEN PEOPLE ARE NOT PARTICIPATING OR WHEN THEY APPEAR BORED

A. Situation one: One or two people (a small fraction of the group) have obviously dropped out of the discussion, apparently from boredom, although the group as a whole appears to be functioning well.

1. Try to determine for yourself whether this behavior is being disruptive to the rest of the group. (Is the dropout staring quietly into space, or blatantly distracting others?) If the behavior is disruptive, the dropout may be expressing some kind of dissatisfaction with the group that he or she has not felt free or able to verbalize. One way of dealing with this immediately is to ask the dropout if there is any comment he or she would like to contribute. You are thus offering the person an opportunity to make any criticism that relates to the disruptive behavior, and allowing the group an opportunity to deal with the problem. This solution has some potential dangers. One is that the individual involved may feel threatened at being singled out, even though the disruptive behavior was calling attention to him or her. Another danger is that the group may become bogged down discussing the needs or problems of one person, which may...
not relate to the purpose of the meeting. You should try to read the situation to decide if the problem should be dealt with openly by the group.

2. If no disruption is involved, and if normal attempts to include the dropout in group activity are ineffective, it is generally best to wait for a break in the meeting and approach the dropout privately to ask if he or she is bored or dissatisfied with the meeting. Try to do this in a low key, friendly, concerned manner not reminiscent of teacher calling the misbehaving pupil in after class. A private encounter is often (though not always) less threatening and is more likely to elicit an honest response. This may also prevent a time-consuming digression within the group. Often the answer will simply be, “I'm not up for a meeting today. I have a lot of other things on my mind.” You should accept and respect this kind of answer. It is not the facilitator's job to force everyone to be interested and active in the group if there are outside factors preventing this. However, if the problem has something to do with the purpose or process of the group, the facilitator can bring it to the attention of the whole group (perhaps by encouraging the individual to express the concerns involved.)

B. **Situation two:** The whole group, or a substantial portion, is bored or unwilling to participate.

1. Consider reviewing the group goals that were set up at the beginning of the session. People may feel that what is happening is irrelevant to their concerns.

2. The proceedings may have become too abstract or intellectual. This may be the time to introduce a specific exercise or role play which will bring the group back to earth and encourage some expression and participation.

3. The group may feel that the session is wandering that there is no apparent movement toward group goals. It is important to preserve a sense of some sort of structure and movement within the meeting. This is where an agenda or timetable is invaluable. You should refer to this frequently during the meeting both as a way of reminding the group of its progress and as a way of allowing changes in the schedule if feelings have changed.

4. It may be time for a break. Participants' attention spans can only be expected to last two hours, at the most. When people are tired, hungry, or physically uncomfortable from sitting too long, participation will quickly drop.

5. Interjection of humor or something unexpected into the discussion is a temporary way of drawing interest back into the group. Use it to focus attention on to whatever you suspect the real problem to be.

6. You may be working at too complex or too simple a level.

7. People may be afraid of or intimidated by the facilitator or some other person in the group (e.g., a person with a dominating personality). Directing questions toward the rest of the group in the former case, or asking for someone else to respond in the latter, may
help to break down inhibitions and get the conversation moving. You should watch out that you do not respond to everything that is said, nor should you let anyone else do so.

II. WHEN PEOPLE COME DOWN ON THE FACILITATOR

A. (An ounce of prevention is worth...) If you have not set yourself up as leader and prime mover at the beginning of the meeting, and if you make it clear that the entire group bears responsibility for whatever happens, it is unlikely that you will be jumped on by the rest of the group. By making your role clear early in the meeting, you provide yourself with a precedent you can refer to if the group should forget its collective nature.

B. Nonetheless the group may attack the facilitator for a variety of reasons the most common being the use of the facilitator as scapegoat for the failures of the group as a whole. This is potentially a constructive situation so it pays not to be defensive. Let the group vent its frustrations, even give it encouragement but try to steer comments away from personal attacks and toward particular problems within the group. Then lead the discussion into possible solutions after all dissatisfactions have been aired and emotions have cooled. (For example someone may attack you angrily, saying that you, the facilitator are responsible for making this a lousy meeting. Others in the group agree directing their remarks to you personally. Hear them through. Then, rather than trying to defend yourself or justify each of your actions look for frustrations which you have felt with the meeting yourself. Express these, and discuss with the group how those problems might have been avoided, not just in terms of what you could have done, but also what the group as a whole might have done. Try to make the point that everyone has a responsibility to make suggestions and provide solutions to the common group problems, and that you can help this process only to the extent that others are willing to contribute and cooperate.)

C. Listen to the criticisms of your facilitation and remember them for future consideration. Facilitators are not meant to be perfect--in fact, we do most of our learning from our mistakes. Direct feedback on your role is not always easy to get, and can be valuable.

III. WHEN THERE ISN'T ENOUGH TIME TO DO WHAT YOU HAD PLANNED

A. This is the most common problem you are apt to encounter. Remember when you plan your agenda that it is easier to underestimate the amount of time needed for a section than it is to overestimate. Make allowances for this by leaving time margins in your plans. Remember to account for the fact that people may be late, that they will probably spend time chatting with each other before they will want to get down to business, and that a few will always extend the breaks beyond the scheduled amount of time.
B. If your agenda won't fit into the time you have, get the group to assign probable time limits to each section (or estimate these yourself if you are planning exercises, etc.)

C. Ask that someone in the group be responsible for keeping track of time. You may be too involved to remember to do this yourself.

D. It helps to prioritize items on an agenda, dealing with the most important ones first. This makes later curtailment much easier to handle.

E. Remind the group when time limits are being approached or exceeded. If group members want to continue in a particular area, and this will mean that something else will have to be squeezed out, make the group aware of this so they can make a decision about what to do.

F. If halfway through the meeting it becomes apparent that time will be short, discuss alternatives with the group, such as extending the meeting, scheduling a later one, etc.

IV. WHEN THERE IS MORE TIME THAN YOU HAD PLANNED FOR

A. There is nothing wrong with concluding a meeting a little early. People usually prefer this to having a session run over its time limit.

B. Don’t try to cover up the extra time with mere "filler" (such as extra long discussions, unnecessary exercises, etc.). If there is something valuable to do in the time which either you or the group can suggest, by all means proceed. (It is always a good idea to prepare purposeful extra items to be used in case there is time, or in case a substitution is necessary.) On the other hand, if you simply drag out the agenda with space filler, the meeting will seem to move very slowly and will lose its sense of momentum; the extra time will be wasted or even counter-productive. Beware especially of discussions which can drag on interminably, long past the point where real information has been exchanged and repetitiveness has begun.

V. WHEN ARGUMENTS BREAK OUT IN THE GROUP

A. This is a difficult situation to handle, but the most important thing is to move the discussion away from personalities and toward the actual problem. Try rephrasing the comments made into general questions to the group. It is best to discourage a back-and-forth exchange between the two people and to emphasize drawing others (who are more neutral and less involved in the personal antagonisms) into the discussion. Some specific approaches you might take are:

1. Ask the rest of the group to comment on the exchange.

2. Restate the issue being discussed with the hope of clarifying it and giving a breathing space in a fast-paced discussion.
3. Focus a question toward one of the involved parties, asking for more specific reasons for a particular point of view; then ask someone else with an interest in the discussion to comment.

4. Ask each of the opponents to summarize the other's point of view. Sometimes simple misunderstandings of each other's position are at the base of an argument and by stating the opponent's beliefs, and giving the opponent the opportunity to correct any misperceptions, these misunderstandings can be cleared up.

These suggestions have the advantage of stopping a one-to-one interchange without shifting the topic off the area of disagreement. This is desirable because other members of the group may have an interest in what is going on, but have no chance to enter into the discussion, and because it is best to deal with disagreements openly rather than arbitrarily sweeping them away (assuming this does not involve spending undue time on a subject that is only of interest to a couple of people). Disagreements that are not resolved create frustrations and tend to reoccur later in more virulent form. Serious arguments that are resolved, however, sometimes move the group along significantly.

B. The seating arrangement can have a subtle effect on this kind of situation. The best setup would be for the sparring partners to be seated next to each other with the facilitator directly across from both people. This is admittedly hard to accomplish, but might occur during a recess after which people are encouraged to come back to different seats (thus the advantage of informal seating in any session). It is generally best for the facilitator to avoid sitting next to either antagonist, or anyone with whom you may be interacting strongly. (See Seating Arrangement, p.15.)

C. Not infrequently, there is someone in the group who seems excessively argumentative, picking minor points in the discussion as opportunities to challenge other people or to engage in lengthy debate. It is quite easy to see how such an individual may become annoying to group members who want to proceed on to other things. So when somebody repeatedly bogs down discussion in petty argument, appeal to the other members of the group as to whether they want to continue the argument or move on. Cutting the person off yourself may be more efficient, but if done repeatedly may cause the person to resent you. By encouraging others to express their wishes, you can reinforce control of the group by its members.

VI. WHEN NOT ENOUGH OR TOO MANY PEOPLE SHOW UP

A. How many people are "too many" or "too few" is a question of the particular situation. If the group is larger than 15, it generally is difficult to have discussions in which everyone can participate. Exercises often become unwieldy in such a large group as well.

B. You should prepare for the possibility of a larger or smaller group than you anticipate by selecting activities that can be modified according to the size of the group, or by having
alternate activities in mind. When you plan your agenda provide leeway for flexibility in
the amount of discussion time, especially if there is doubt as to the size of the group.

C. When a group is too large (or when there is a clear division in members' interests) you
may want to divide the group into smaller discussion groups. This is one circumstance
where it is especially convenient to have two facilitators. If you are facilitating alone,
you can move from one group to another, or you can get volunteers from the group to
facilitate the smaller sections.

D. Having a smaller group than anticipated is more of a psychological than a real
hindrance. A small group can proceed to do quite well what a larger group was expected
to do. But if those who did come exhibit disappointment about the low turnout, it is
good to emphasize the positive aspects of the situation to bring people's spirits back up.
Start the session with a brief discussion of the reasons for the low turnout, point out
what the group still can accomplish, and reaffirm everyone's intentions of continuing
anyway. (Or, alternatively, decide as a group to wait for a better time to have the
meeting.)

E. If the group turns out to be quite small, you can work with a much looser structure
(although structure should not be abandoned entirely). You will be able to be more
flexible and informal and participants will be able to interact on a more personal level.

VII. WHEN FACILITIES AREN'T GOOD FOR WHAT YOU ARE DOING

A. (Something was said about an ounce of prevention...) Again, it is well to prepare for this
contingency in advance by finding out what the facilities will be, or better still, visiting
them yourself. If another person is making the arrangements, make it clear what you
will need in the way of equipment, space, and furniture

B. If you show up and things still are not what you expected, consider the options
available. Can the furniture be moved around? Can you move to a different location
(out-of-doors, somebody's home, etc.)?

C. Ask the group's suggestions about specific problems such as no kitchen facilities, no
movie projector, etc. Can your agenda be revised in such a way that you can still meet
the group's goals for the meeting in the present situation? If not, are people still
interested in sticking it out with modified plans?

VIII. WHAT DO YOU DO ABOUT YOUR OWN FEELINGS?

While you will usually not find your own feelings to be a problem (more likely they will be an
asset: the facilitator is not, nor could be, a detached observer of everything that is going on)
there may be occasions when you will be tempted to dominate the proceedings with your own
feelings. Since the facilitator is in more of a position to talk freely and exert control than other
members of the group, you should be careful that your own feelings and viewpoints are not the
only ones being discussed by the group. Monitor the discussion to see if other people's reactions are being elicited and responded to. When group members speak, are they addressing their comments primarily to you, or do they include the whole group? The inexperienced facilitator is especially prone to being too active, feeling that he or she must respond to every little hitch in the proceedings with a comment or suggestion. Be patient and give things a chance to work themselves out before you take action.

IX. VOYEURS AND FLASHERS

It may be the specific purpose of a group to bring out the emotional life of its participants and to engage in self-revelations and emotional confrontations between members (as in a consciousness-raising group). However, if the purpose of the session is to exchange information, develop priorities, or some other cognitive or practical goal, unnecessary emphasis on emotional revelation can detract from the aims of the session. If an emotional situation arises as a product of group interaction it should, of course, be dealt with. But revelation for revelation's sake should be avoided. Occasionally someone will attend a cognitive workshop with the expectation of following sensitivity group procedures and will emphasize dramatic emotional displays and will pressure other participants to do the same. If you become aware that a participant is detracting from the real purpose of the group in this way, try to gently get things back on track by pointing out that time is being lost, or by checking out with the rest of the group what kind of subject matter they want to emphasize. It is a good idea to have a private conversation with the person in question when a break in the session allows it. Point out that the individual seems to have different expectations of the session than the other members of the group and is causing a distraction.

If the problem involves a number of people wanting to follow sensitivity-group procedures, while a good portion of the group does not, it would be necessary to have a group discussion clarifying participants' needs and expectations and deciding what to emphasize in the session.

X. WHEN AN EXERCISE FLOPS

A. There are two ways for an exercise to flop: when the exercise simply doesn’t proceed the way it was supposed to; and when it does proceed as it should, but the group misses the point of the whole thing. If you know the exercise well (and you should!) you might realize that faulty instructions, apathetic participation, or some external factor is at fault. Recognizing this, you can provide some insight to the group.

B. When you realize that an exercise flops, the first thing to do is admit it. Point out where your expectations were shot down, find out how others reacted, and discuss why this occurred. Talk about what could have happened. Such a discussion may, in itself, provide worthwhile information. Don't try to double talk your way out of a floppy situation or find significance where there is none: Others will sense your lack of honesty and may be discouraged from being sincere themselves.
C. Be prepared to switch to something completely different. Hopefully, all the exercises you have prepared are not of the same type. The response to another activity may be completely different.

D. It could be that the roles played by various individuals were poorly assigned. Allow people to do what they would most like to do; their effort and imagination will be greater in such a case.

XI. WHEN SOME PARTICIPANTS CAUSE INTERRUPTIONS

A. One kind of interruption is when a participant has a tendency to cut off the current speaker with a comment of his or her own, or detracts from what the group is doing by leading the conversation to an irrelevant topic. Usually, if you diplomatically point out what is happening, the problem will be remedied. However, if the interruptions are occurring in a fast-paced, emotional discussion, some more definite measures may be needed. Suggesting a minute of silence may be enough to cool things off; so may asking people to talk slowly. A classic technique is to use some object, such as a coin, which is passed from speaker to speaker, and only the person with the object in hand is allowed to speak.

B. Another sort of interruption is caused by people getting up to go to the bathroom, get a drink of water, etc., which, depending on the circumstances, can be very distracting. Having scheduled breaks in the session will minimize this problem, unless the interruption represents boredom or dissatisfaction.

XII. MISTAKEN EXPECTATIONS - WHEN YOU HAVE BEEN MISREPRESENTED TO THE GROUP, OR THE GROUP TO YOU

A. You have been misrepresented to the group:

1. We assume that during your negotiations with the group, or its representatives, you will have clarified what your function will be and what the group expects of you, but there is always the possibility of faulty communication somewhere in the procedure. When you get together with a new group one of the first things you should do is explain clearly what you feel your role is and what you plan to do. Hopefully, any misconceptions on the group’s part or your own will be cleared up at this point, but not necessarily. False expectations can be remarkably tenacious.

2. Try to look for signs of mistaken expectations. Are questions being addressed to you about matters on which you have no expertise? Do people look to you for approval at every step? Are people unduly reluctant to give suggestions or participate? Do participants seem confused or resistant to what you are trying to do? Does it seem that you and the rest of the group are going in different directions? If there are signs that the group is expecting something other than what it is getting you should immediately bring
your suspicions into the open so the group can clarify what they thought they were getting into. Hopefully, either the group will be willing to accept something different than what they had expected, or you will be able to modify your own plans, or both.

B. The group has been misrepresented to you. After working with a group for a short while, you may become aware that you didn’t really know what you were getting into. At this point, you have three options:

1. You need more information from the group in order to do a good job of facilitating the rest of the session. The group has, for instance, different problems than the ones you had expected, but you need to know more about these before you plan accordingly. Be open about the situation, since acquiring needed information will require either time out of the agenda, or delaying the meeting until after you can do more homework. Taking time out to gather information does not always have to detract from the meeting’s purpose. Sometimes a group can profit in its own understanding by defining itself for an objective outsider.

2. There may be occasions when you don’t think you can continue to facilitate or function in the group and must drastically change your role. (For example, you are a committed feminist and had been told you would be working with a “women’s group”; and the group turns out to be a committee to lobby against the ERA.) In such a situation, it would not be fair to either simply walk out or to pretend that no conflict existed. It would be best to explain your viewpoint and what you can or cannot do with the group. If an accommodation can be reached at all, it will be through an honest discussion.

3. You may decide to say nothing. Sometimes you will be surprised by what you find in a group (e.g., they turn out to be a lot more disorganized and unstructured than you expected), but if you can see for yourself how the group is different from your expectations, there will be little point in taking up group time discussing how and why your preconceptions proved wrong. Simply modify your plans according to the new situation as best you can. This situation is one you will probably experience sooner or later since you will never really know what to expect of an unfamiliar group until you have actually worked with it.

XIII. YOUR MATERIAL IS TOOSIMPLE OR TOO COMPLEX FOR THE GROUP

If what you are saying is too simple for the group, boredom will result. If what you are saying is too complex, you can expect confusion and blank looks. Unfortunately, blank looks and boredom look remarkably alike, so it is not always easy to figure out which problem you are dealing with. Try to be sensitive to how the group is responding to material you use and be prepared to adapt to their level. Following are some things that will help you be alert to the group’s level of comprehension.

A. Ask before doing an exercise if members of the group have ever done anything similar.
B. Begin a session by asking for some history of the group’s previous experience, if for some reason you do not already know this.

C. Stop occasionally and ask if the group understands what you are doing.

D. Define any terms you may use in a specialized sense such as “evaluation” or "group process." Avoid using facilitator jargon.

E. Make sure everyone is following you. Responses from the same few people may mean that the rest of the group is far behind or far ahead.

F. If participants are moving at your speed, you can generally see it in their faces and in their level of participation. Nodding heads, interested expressions, occasional questions or comments, are good signs.

G. The type of question asked is the best indicator of what the level of comprehension is. People asking you to repeat what you just said, or questions about the terms you are using, are signs that you are on too complex a level. Questions that are surprisingly knowledgeable, showing familiarity with what you are just introducing, or incorporating points or terms which you have not yet used, are signals that you are on too simple a level.

H. If only one person is having difficulty comprehending what is happening, or is puzzling over one particular point when the rest of the group is satisfied (you might check this out with the group to make sure your impression is correct) do not take an excessive amount of time dealing with the one person during group time. Don’t callously brush the person off, but suggest that since the rest of the group is ready to move on, the two of you can discuss the subject more during a break or after the meeting.

In the same light, don’t leave the rest of the group far behind while you have an exclusive interchange with one or two members of the group whose sophistication in a certain area is ahead of the others'. Suggest that you return to a discussion that the whole group can participate in.

XIV. SOMEONE “FREAKS OUT”

There are many reasons why a group member might have a sudden, uncontrollable emotional outburst. The individual may feel rejected, anxious about a personal problem brought out by a group exercise, or disturbed by something that has been expressed in the group. Unlike other potentially lengthy interruptions which threaten a group, the “freak out” cannot be adroitly sidestepped, contained, or delayed until after the meeting. Since the emotions expressed are strong and important ones, they change the whole atmosphere of the meeting and require immediate recognition and response. Of course the actual problem that causes the outburst (whether it be a serious psychological disturbance or a temporary anxiety) cannot be "solved on the spot. The immediate need is to deal with the urgent feelings being expressed.
A. The first thing to remember is to stay calm. If the facilitator is relaxed and in control, but expresses sincere concern, it will go a long way to making the atmosphere in the group that of dealing with one member's urgent emotional expression rather than that of an "exciting emergency."

B. The other members of the group, unless they are threatened or frightened by the outburst, will probably be concerned and will feel sympathy for the person who is freaking out. However they may be too embarrassed or uncomfortable in the situation to express their sympathy and support. Awareness of support from other group members will probably be helpful to the person with the problem during the outburst, and will let him or her feel more comfortable in the group after it is over. Don't openly elicit expression of sympathy from others since this may cause even more embarrassment or discomfort, but allow room for other people to communicate.

missing page 70

natural venting of feelings and go on from there. (If the group has trouble settling down to business at this point, it may be a good time for a short break.)

H. If the freaking out is treated as a private matter and dealt with apart from the group, participants may not have dealt with their own reactions to the episode and a short discussion of how the group has been affected may be necessary before going back to business.

XV. SUMMARY

Following are some simple principles that are good to keep in mind in preventing problems or dealing with problems that do occur.

A. Adequate preparation for a group is the best safeguard against serious problems.

B. Make sure you know what the group expects of you, and let them know what you expect of the group.

C. Be flexible in your planning; have alternate sequences of items on your agenda, and substitutions in mind.

D. Don't be too serious when you confront a problem. A little humor can make the situation much easier to handle.
E. Make sure you **have an understanding with the group**: they share the responsibility for the meeting. They are free to criticize and are responsible for letting the facilitator know what is going on and what their reactions are.

F. Be **honest** with the group at all times.

G. Try to **anticipate problems** you might have. Catching them early has many advantages.
Dealing with Challenging Group Participants
Dr. Ginny Barnes

Dealing with Challenging Behaviors: Objectives
- Understand different behaviors
- Identify positive strategies
- Discuss & apply strategies to diffuse behaviors

When Stress/Fear happens...
- We turn into a group of Animals

Challenging Behaviors
- Interrupting/Talker Skunk
- Rude Interrupting Bull
- Hostile Challenging Snake
- Rambler Chipmunk
- Dominator Lion
- Whining Walrus
- Silent, Shy Ostrich
Pre-call
- Helps set the stage
- Sets boundaries and limits
- Go over "Ground Rules"
- Not asking for consensus or agreement
- Time is important
- Be succinct
- Stories/testimonies take away from time for others

The Skunk...the Interrupter/Talker
- Constantly interrupting
- Talks to another person
- Interrupts facilitator or others
- Needs to express an opinion
- Wants to be heard
- Has a better way
- Has had more experience

How to Handle The Interrupter Talker Skunk
- Pre call how to take additional comments
- Compliment and ask them to hold their thought
- Ignore them
- Use discouraging body language
- Set limits
- Fogging
- Dominance break and talk

The Bull: Rude Interrupter
- Loud voice
- Quick Temper
- My Way or Highway
- Talks over others
- Wants attention
How to Handle the Rude Interrupter

- Ignore interruption
- Address interruption
- Shorten comments
- Be firm/assertive
- Limit body language
- Set limits &
  expectations
- Stand by them
- Don’t declare war

Hostile Challenger

- Doesn’t LIKE the
  process
- Manipulative
- Negative
- Wants to change
  process
- Disorients information

How to Handle the Hostile Challenger

- Pre-call differences of
  opinions
- Clarify expectations
- Review the Ground
  Rules
- Don’t “give in” to
  avoid backlash
- Talk to some privately
  prior to meeting

The Rambler Chipmunk

- Has trouble being
  succinct/to the point
- Goes on /or telling
  stories or examples
- Is a likeable person
- Wants to be helpful
- Has good attitude
How to Handle the Rambler Chipmunk
- Pre-call succinct statements
- Ask for their commitment to be focused
- Set guidelines
- Create safety for their own opinions
- Don't attack them personally

How to Handle the Dominating Lion
- Takes control of the discussion
- Knows everything
- Is the most important "King of the Jungle"
- Doesn't listen to others
- Has always "been there, done that..."
- Big Ego

How to Handle the Dominating Lion
- Review the Ground Rules
- Recognize their knowledge/experience
- Don't tell them they are wrong. Use "In my experience..."
- Use body language
- "Let's hear from others"
- Take a break
- Talk to them privately

The Whining Walrus
- "I'll never work, we tried that before"
- Given up changing
- Been around forever and has BIG Blame Bag
- Feels like a victim, has no control
- Not likely to speak up and be assertive
How to Handle the Whining Walrus
- Acknowledge them & what said: MFFM
- Ask them to be specific about complaint...
- Give them assignment
- Help them be successful problem solving
- Don't let them drag you down. BE POSITIVE
- Move on
- Talk privately

Shy/ Silent/Tongue Tied Ostrich
- Usually good ideas
- May be embarrassed to talk aloud
- May not be "good with words"
- Waits until the last minute to add ideas
- May have need to please, be perfect
- May not want to create conflict

How to Handle the Silent/Shy/ Tongue Tied Ostrich
- Pre-call expect ALL to participate
- Create "safe place"
- Coach them & remind occasionally/patiently
- Support them, thank them for ideas
- Use eye contact to solicit ideas

Conflict and Disagreements
- From unexpressed fear of lost control/my way
- Consider ALL ideas
- Humor
- Take a break
- Suggest further discussions later
Six Steps for Handling Challenging Participant
- ATTACK THE PROBLEM NOT PERSON
- LISTEN
- CONTROL EMOTIONS
- CHOOSING THE RIGHT APPROACH
- HAVE A POSITIVE ATTITUDE
- GIVE POSITIVE CONSEQUENCES

Realign Your Thinking
Myth #1 - You can change the other person
Myth #2 – You can get rid of them & the conflict
Truth – You can adapt your behavior

Best Behavior
- “Whatever kind of word thou speakest, the like shalt thou bear.” --Greek Proverb

REMEMBER...
- YOUR SIGNATURE IS ON IT!
Giving and Receiving Feedback

Feedback is a way of learning more about ourselves and the effect our behavior has on others. Constructive feedback increases self-awareness and encourages development, so it is important to learn to both give it and receive it effectively. Feedback should be aimed at creating actual change and helping learners discover how to continuously evaluate their own performance. Below are some guidelines to help achieve this:

Guidelines for Giving Constructive Feedback

When giving feedback it is helpful to create a respectful, friendly, open-minded, non-threatening environment. Establish a climate of trust in which learners welcome and invite feedback in the spirit of caring and concern for genuine learning. It is also important to elicit thoughts and feelings both before and after giving feedback.

Plan for Feedback

Feedback is more effective when it is incorporated into an established learning process; it should not come as a surprise. Let learners know that you encourage ongoing, open dialogue and that you will be providing both formal and informal feedback throughout your learning sessions. Ask learners what preferences they have about how they like to receive feedback. For ongoing training or educational programs, you may consider planning regular opportunities for “check-in” feedback (a few minutes at the beginning or end of each session, over lunch, etc.) Discussing chart notes at the end of a clinic session is another opportunity to incorporate feedback.

Select an Appropriate Time and Place to Give Feedback

Choose correct timing for feedback: pick a time and place where you will not be interrupted, and where the environment is appropriate to the type and context of the feedback message you are delivering. Explain the value of feedback and that you want to give feedback to support an individual's growth and learning.

Feedback is most effective when it occurs as close as possible to the behavior it addresses. The earliest opportunity after an event is optimal, but the impact may lessened if the timing is inappropriate. Praise is most effective when given as soon as possible after the behavior has occurred. Immediate feedback will also help to reinforce a correct behavior and make it more likely to happen again. When addressing an incorrect behavior, feedback should ideally be given before the situation occurs again.

It is also important to determine whether the receiver is ready to hear the feedback. Has the learner indicated readiness and willingness to listen and accept the feedback as it is intended? Feedback should be given at an emotionally appropriate time, and support should be available for the learner as needed. In some situations, you may want to say, “I have some feedback for you. Would this be a good time to talk?”

Feedback should not be given during stressful times; when either party may be rushed or interrupted; when either party may be angry or frustrated; or at a time when the learner is not ready or able to receive feedback for a particular reason. Do not share
negative reactions in the presence of others who would not understand the context or constructive intent of your remarks. Respect confidentiality and give feedback in private as appropriate.

Give Feedback in Appropriate Quantity
The amount of information should be appropriate to what the receiver can use. Be brief and concise. Too much feedback can be overwhelming and may decrease the usefulness of the information. To avoid overloading learners with feedback, start with the highest priority issues first, and limit feedback to a few important points that can be addressed one at a time.

Encourage Self-assessment
Self-assessment involves the learner in the feedback process, helps to promote an open dialogue between the learner and the instructor, and provides an insight into the learner's thought processes.

Before giving feedback, ask the learner to self-assess:

“How do you think you did?”
“What do you feel went well? What do you feel you need to work on still?”

Self-assessment also helps learners assume more responsibility for their own abilities and performance. Encourage learners to regularly solicit feedback as part of their own learning processes.

Be Supportive
The reception and use of feedback involves many emotional reactions, so it is important to be sensitive to the receiver and their reactions to the feedback. Learners are better able to hear and apply feedback when they feel supported rather than criticized. Acknowledge that it can be difficult to hear feedback, and emphasize that the feedback process is about making changes to specific behaviors, not about the learner as a person.

Support what the learner has done well with praise and encouragement, but do not de-emphasize the importance of areas that need improvement. When giving feedback aimed at changing behavior, be aware of some possible solutions to potential problems beforehand, and be prepared to suggest alternatives as appropriate.

Describe Specific Behaviors
Constructive feedback should be descriptive rather than evaluative: describe the behavior and its effects that you see. Focus on behaviors related to a particular situation that can be changed, not on personal characteristics or speculation about the receiver's intentions. Specific feedback on behavior that can be changed gives more opportunity for learning. Making observations allows learners to process and respond to your information less defensively.
Give details about what specifically was done well and what might be done differently. When talking about behaviors, be as specific as possible, use nonjudgmental language, and provide concrete examples:

"I noticed that when you acknowledged and addressed the mother's concerns about transmitting HIV to her child, she appeared relieved and less anxious."

When giving feedback about a particular incident or addressing performance that needs to be changed, be sure to have all the facts. Be specific and focus on behavior and performance facts as observed:

"I noticed that you seemed to have difficulty understanding what the patient was saying."

"In your last few work-ups, I've noticed that you took shortcuts that seemed to save you time and effort, but caused you to miss important diagnostic information."

Focus on Exchanging Ideas and Information, Not on Giving Advice
The value of feedback is rooted in its helpfulness to the receiver, not in satisfying the personal needs of the giver. Share information instead of just offering advice: telling a learner what to do is less effective than having the learner formulate a course of action based on the feedback given. Offer alternative strategies or information to allow the receiver of feedback to take ownership of the information and decide its value.

Encourage the sharing of ideas for initiating action without personal opinion:

"What actions can you think of that would help build on your skills in this area?"

"Have you thought about --?"

"Your options include --."

"What can we work on together to achieve our desired outcome?"

"What can I do to help?"

Utilize Effective Communication Skills
They way feedback is delivered always affects how it will be received. When communicating feedback, be mindful of the messages that you send through body language, facial expression, and voice. Center your attention exclusively on the other person. Use open gestures and body language; deliver feedback in a clear, steady and neutral tone of voice; and maintain eye contact as appropriate.

Utilize effective interpersonal communication skills such as:

"I" Statement Language
Non-defensive, feeling language in the form of "I" statements communicates personal messages much more effectively:

"I would like you to start/stop/change --."

"I understand that you --."

"What I see is --."
Open-ended Questioning
Use open-ended questions to allow and encourage more elaboration and detail. Avoid closed-ended questions when you wish to elicit more information from someone.

<table>
<thead>
<tr>
<th>Use Questions Like:</th>
<th>Avoid Questions Like:</th>
</tr>
</thead>
<tbody>
<tr>
<td>What ...?</td>
<td>Do you ...?</td>
</tr>
<tr>
<td>How ...?</td>
<td>Did you ...?</td>
</tr>
<tr>
<td>Who ...?</td>
<td>Have you ...?</td>
</tr>
<tr>
<td>Tell me about ...?</td>
<td>“Yes/No-only” questions</td>
</tr>
</tbody>
</table>

Reflecting Back
Use paraphrasing -- putting what someone has said into your own words and reflecting it back -- to check that you are listening and show your understanding of how the receiver is accepting your feedback.

Maintaining Silence
Encourage receivers to take their time when processing and responding to feedback. Allow plenty of time to think through replies to challenging questions or information. Maintain eye contact and demonstrate an interest.

Explore Issues Fully
Take time to clearly identify and organize issues that need to be addressed. Use probing questions to explore and gain a full understanding of the learner’s perspective of the context in which specific performance or behavior. If you experience resistance from the receiver, continue to listen for new information and continue to be specific until it is clear that your message is understood.

Describe the Consequences
Giving constructive feedback is more effective when the receiver fully understands the consequences. When giving feedback be aware of its consequences and be prepared to follow up with appropriate support. Clearly discuss expectations and timelines for any required action. To build a commitment to change, state the benefits of changing and describe the positive consequences of the behavior being addressed. Make sure that learners understand what is expected of them, and, as necessary, the consequences of not improving performance or changing behavior as well.

Check to Ensure Clear Communication
Feedback is often subject to distortion or misinterpretation, so be sure to check that the receiver understands your message. Verify understanding by asking learners to rephrase what they have heard from you, and to talk about their assessment of the issues you have raised. At the end of the session, restate the key aspects of the feedback discussion, add your own points of emphasis, and summarize the important issues and any plan for action.
Develop Follow-up/Action Plan
Feedback is most useful when it addresses things that can be changed. However, constructive feedback is about sharing reactions, not demanding change. When done well, skilled feedback offers the receiver a choice about whether or how to act upon the information. Provide appropriate follow-up to your feedback and engage the learner in negotiating a plan for dealing with any problems identified and monitoring progress. Work together to identify the desired performance result and determine how it can best be achieved.

Receiving Feedback
Feedback related to performance or behavior is some of the most important information we can receive from others. Learning how to receive feedback is equally important as learning how to give effective feedback. The challenge lies in learning how to receive feedback with an open mind and grow from it, and in resisting the natural impulse to get defensive. Below are some tips for receiving constructive feedback:

How to Solicit and Receive Constructive Feedback
☑ Signal when you are seeking assistance by asking for feedback in advance. This allows the feedback provider to think about the feedback they will give you, and also the opportunity to express any concerns about giving feedback (not the right person to give it; not motivated or interested; not the right time; etc.)

☑ Decide on the outcome(s) you want and why, and how getting feedback will help. Make sure you are in fact ready to receive feedback!

☑ Be specific feedback: you can indicate your readiness to receive feedback and help the giver provide useful and actionable information by asking for feedback about specific things:

   ✔ LIKE THIS:  "Will you please help me organize the outline of my case presentation?"

   ☑ NOT LIKE THIS:  "What do you think of my case presentation?"

☑ Avoid asking leading questions (e.g., "You thought my case presentation went alright, didn't you?")

☑ If a change in performance is indicated by the feedback you receive, be prepared to discuss what to do differently in order to achieve your outcome.

☑ Share your reactions to the feedback you receive in order to help the giver improve their skills at giving useful feedback. Always thank the giver for feedback, even if you do not completely agree with it.
How to Receive and Deal with Less Constructive Feedback

- Avoid "taking it personally." Try to identify the motives for giving you particular feedback at a particular time. Keep clam and maintain control of the discussion. Do not lose your temper, argue, or try to justify your position.

- Center yourself by taking several slow, deep, deliberate breaths before the feedback discussion takes place.

- Keep an open mind, act on the things you agree with, and be prepared to discuss the things you do not agree with or do not understand.

- Utilize interpersonal communication skills: establishing rapport, active listening, and effective questioning.

- Allow the person giving you feedback to complete what they are saying and wait at least three seconds before you reply. Listen to and consider the information before responding, as opposed to reacting.

- Use empathy to acknowledge and deflect any anger or aggression you detect from the giver:
  "I understand you are angry that I did not consult you about -- ."

- Remember that feedback is about specific performance-related behavior or instances, not about making personal judgments. If the feedback is subjective or directed at personality traits or attitude, use questioning skills to refocus the feedback on to real and actionable issues by asking for specific examples.

- If the feedback is too vague, probe for more details. Ask questions for clarification.

- Make sure you understand the feedback by summarizing the giver's criticisms and reflecting them back in your own constructive words.

- Accept feedback as a learning and growth experience in the spirit of continuous quality improvement. Visualize successful outcomes of any change that is indicated from the feedback you receive.

Challenging Feedback Situations

Not everyone is open to receiving feedback or willing to adapt their behavior. Consider these challenging feedback situations as opportunities to sharpen your feedback skills.

Handling Disagreement

It is important to be prepared to handle disagreement because it is one of the most disconcerting reactions and can occur in almost any feedback situation. Your response will depend on whether the other party is disagreeing with the facts - the behaviors and performance you have described - or with the question of whether these behaviors are a problem.
When the receiver is signalling disagreement with your feedback:

1. Give as many explicit examples of the known facts as you can.
2. Probe for the areas of disagreement:
   "Are you disagreeing that the incident took place or only certain details of the incident? Which details?"
3. Probe strongly around differences that exist between versions of events. Be prepared to adjourn the feedback discussion and investigate further if necessary.
4. Clarify consequences of behavior.

Managing Shock or Anger
It is also important to be prepared for the emotional reactions that are a natural part of receiving feedback:

1. Signal permission (OK to cry, etc.) to allow for emotional reaction.
2. Empathize with the receiver’s situation and acknowledge their right to be angry
3. Control the pace of the feedback session by judging the receiver’s reaction.
4. Give the receiver time and space. Be prepared to talk about why the receiver finds the feedback so upsetting.
5. Move forward into the positive part of the session.

Feedback Models
In addition to the main principles and techniques of giving and receiving feedback described thus far, it is also helpful to follow a model of giving feedback that you are comfortable using with confidence. Work with feedback models and techniques to find the combination that is most likely to be successful for both you and your learners.

Feedback Cycle
The feedback cycle is a continuous process of observation, reflection, negotiation, and implementing change.

To help tailor feedback to the learner’s specific needs, discuss and negotiate the key areas that the learner would like to focus on:

"What specific areas would you like us to focus on during the consultation?"

The observation is followed by reflection on and discussion of the issues raised during the initial discussion, as well as any other issues that may
have arisen. This process requires a balance of challenge and support to help the learner feel stimulated to learn, rather than defensive or resentful. Use questions that encourage reflection:

“What features of the history led you to that diagnosis?”
“What you asked the patient about her weight how do you think she felt?”

During the reflection process, provide specific feedback on areas of strength as well as areas that need to be improved. Use this information to identify ongoing learning needs and develop an action plan for implementing change:

“The things that you do well and should continue doing are — .”
“Things that you should do less of are — .”
“Things to focus on in the future are — .”

**Pendleton’s Rules**

Pendleton’s rules guide educators to give balanced feedback to learners. This structured approach to providing feedback centers on the fundamental principle that it is outcome-based. Follow these steps in order immediately after an observed event:

**Step 1:** Briefly clarify any points of information/matters of fact.

**Step 2:** Ask the learner to discuss, “What went well?” Ensure the learner identifies strengths of the performance.

**Step 3:** Discuss what went well, adding your own observations. If there is a group observing the performance, ask the group what went well, limiting discussion to the strengths.

**Step 4:** Ask the learner to identify and discuss what did not go well and what could be done differently next time.

**Step 5:** Discuss what went less well, adding your own observations and recommendations. If there is a group observing the performance, ask the group to add their observations and recommendations.

Pendleton’s rules also provide a useful framework for reflecting on the times when you have given feedback. It is always helpful to review how you provide feedback, what works best for you, and why:

- What went well in these situations?
- What did not go so well?
- How do you think the receiver of the feedback felt?
- What will you do differently next time?

The limitations of these rules are that people may find it hard to separate strengths and weaknesses in the prescribed manner; it can take a long time to identify learners’ needs, and the structured approach can limit or prevent more in-depth consideration of priorities.
Presentation Feedback Form

Presenter: ____________________________  Date: ______________________

Topic: _______________________________

<table>
<thead>
<tr>
<th>CONTENT</th>
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| 1. **List 2 things that you enjoyed or found interesting about the content of this presentation**  
  (E.g. it was new information, corrected misinformation, well organized, etc.) |

<table>
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<th>DELIVERY</th>
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| 1. **Identify 2 positive things about the trainer’s style/delivery**  
  (E.g. great eye contact, connected with the audience, used humor, good voice tone, etc.) |

| 2. **Describe 2 changes you would suggest to improve the content of the presentation**  
  (E.g. content inappropriate for audience, confusing, material didn’t seem relevant, etc.) |

| 3. **Were Health Disparities/Social Justice Issues Addressed?**  
  ___Yes ___ No ___ N/A  
  *Comments:* |

| 2. **Identify 2 suggestions to improve the delivery of the presentation**  
  (E.g. add open-ended questions, less monotone voice, no judgmental language, etc.) |

| 3. **Other comments about this session:** |
## Trainer Checklist

### In Advance of Training

- If applicable, conduct a pre-training needs assessment
- Talk to the people requesting training about what they hope to achieve
- Decide on date/time/location of training/how many people
- Create learning objectives for the training
- Determine title and topic
- Think about the needs of your audience/what do I want them to walk away with?
- Decide if doing training alone or with co-trainer(s)
- Identify speakers
- Set up planning calls with speakers and planners (if necessary)
- Identify contact person at site for training
- Create a budget (if applicable)
- Other: ________________________

### The Week before the training:

- Confirm logistics:
  - If applicable: arrange for refreshments (food/snacks)
  - If applicable: create a sign in sheet, agenda and an evaluation
  - If applicable: provide parking information
- Do a more detailed trainer agenda (as needed)
- Identify best and most interactive methods for teaching the content
- Determine if there are any additional handouts/will you have packets?
- Print out your slides/handouts for you and for the group
- Send out reminders to the participants/team
- Check-in with contact person to confirm
- List of Group Agreements (as needed)
- Certificates of completion (as needed)
- Training Supplies you might need:
  - Timer/Tibetan Bells
  - Markers/Pens
  - Tape
  - Computer
  - LCD projector
  - Butcher paper/Easel
  - Other Props or incentives
  - Other: ________________
- Optional: __music
- Prepare signs for training (as needed)
- Practice with others (if appropriate)
- Other Materials:
  ________________________

### On the Day of the Training:

- Arrive early and connect with contact person
- Self-care: Eat, get water, go to the bathroom, etc.
- Room set up/post signs
- Have sign in sheet/pens/handouts/packets
- Set up and test any equipment
- Prepare butcher paper (as needed)
- Bring any trainer materials
- Review learning objectives and agenda
- Name tags
- Refreshments/food set up (if applicable)
- Other: ________________________

### After the Training:

- Training materials collected
- Room cleaned up
- Room locked (as appropriate)
- Sign in sheet and evaluations collected
- Follow up emails or posting of materials to a website (if applicable)
- Follow up/thank you email to the training organizer or contact
- Follow up on any questions/send resources
- Review the evaluations and make note of changes for future trainings
- Send evaluation summary to contact person, speakers and others (if appropriate)
- Other: ________________________
Other Ideas:

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DEFINING GOALS AND OBJECTIVES

1. Assess the learner's needs.

2. Develop an impact statement. This is your training goal.
   a. What do you want audience members to do as a result of this instruction?
   b. What do people who are already doing this know?
   c. What do people who are already doing this feel, believe, or value?
   Impact statements are written in the form, $b+c$ so that $a$.

3. Write instructional objectives. Instructional objectives describe desired change in learners. The objectives are usually written with a root phrase.
   Example: As a result of this instruction, the learner will be able to ____________.

   Objectives should be written in a way that makes them measurable. It is important to use a verb in the objective which identifies a measurable action. Writing objectives in this manner will assist with program evaluation. The following list contains helpful verbs to formulate objectives based on whether your instruction aims to affect knowledge, attitudes, or skills.

   a. Cognitive or knowledge objectives:
      fact objectives: define list recall
      name repeat recognize
      record state label

      understanding or comprehension objectives: discuss identify express
      describe translate convert
      explain restate estimate

      application objectives: compute operate apply
      demonstrate perform use
      illustrate interpret practice

      analysis objectives: analyze distinguish differentiate
      compare contrast categorize
      appraise classify outline

      synthesis objectives: synthesize diagnose propose
      design manage hypothesize
      summarize plan formulate
b. **Attitudinal objectives:**
   - show sensitivity
   - be willing to assist
   - respect opinions
   - accept responsibility
   - demonstrate commitment

c. **Skill objectives:**
   - perform
   - demonstrate
   - show
   - conduct
   - compute
   - teach
   - role play
   - take
   - operate
   - complete
   - design
   - do

4. **Match objectives to the training modality.** Didactic methods can affect knowledge in the areas of fact comprehension and application, and they can assist in creating a low level of change in attitudes. Interactive methods can affect knowledge in the areas of fact comprehension, application, and analysis, synthesis, and evaluation. Such activities can create a moderate to high level of change in attitudes. Experiential activities similarly affect knowledge, and may have a higher impact on attitude change. Skills change through demonstration and practice.

5. **Share your objectives with learners.** Display your willingness to be accountable for your training by making learners aware of what you set out to accomplish in training. Write objectives so they are visible and available on easel paper or on your printed agenda. Insert objectives into evaluation forms, so participants can assess for themselves whether you accomplished them.

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**Source:**
Mountain-Plans Regional AIDS Education and Training Center, Denver, CO.
BE PREPARED!

TRAINING COORDINATION TIMELINE

6-8 weeks before the event
→ Needs assessment with on-site coordinator, key staff
→ Identify target audience
→ Develop training outline
→ Choose vendor for printing or copying
→ Identify and reserve training site
→ Make contracts or other agreements with co-trainers, speakers

4 weeks before the event
→ Refine target audience
→ Develop and mail flyer and registration form (or arrange with on-site coordinator to distribute registration forms)
→ Set up participant database for registrations
→ Announce training to your agency's staff

3 weeks before the event
→ Order supplies
→ Confirm site reservation
→ Develop pre- and post-test
→ Develop evaluation form

2 weeks before the event
→ Check in with on-site coordinator re: number of participants, continued availability of the facility, any changes anticipated
→ Organize training packets
→ Assemble audiovisuals (slides, overheads, videos, etc.)

1 week before event
→ Confirm travel reservations, if any
→ Prepare supplies and materials for training, place in boxes

Event
→ Arrive at least 30 minutes prior to scheduled start time
→ Check set-up and comfort of the room
→ Prepare to register participants and distribute materials
→ Place welcome and directional signs in the facility
→ Conduct pre- and post-tests, evaluation

1 week after event
→ Send thank-you letter to on-site coordinator, needs assessment participants
→ Enter pre-/post-test data, registrations, and evaluations into database
→ Analyze evaluation data, complete report of training
THE FLOW OF TRAINING

When you plan training, pay careful attention to the sequencing and flow of activities to assure that new learning is assimilated, and that learners have a clear plan for practice when they leave a training event.

In didactic training, sequencing moves from the simple to the complex. The trainer clearly outlines or reviews basic concepts, then builds new information from that shared understanding of the basics. Remember to tailor language and examples to meet the needs of visual, auditory and kinesthetic learners. Illustrate new concepts with practical examples whenever possible. Keep in mind that the short-term memory can usually only absorb and integrate five or six pieces of new information at a time.

In interactive and experiential training, the flow moves from new experience to application:
- The sequence begins with a group activity or interaction;
- When the activity is complete, the group reports, sharing observations and reactions about the experience, or what they have learned;
- Next, the trainer assists the participants in processing their experiences, examining themes or patterns emerging from their work;
- A critical step is generalizing, drawing inferences from the shared experience and linking it to practice (the “why” of learning); and
- Finally, the training must address the future practical application of new insights, information, and skills.

The job of the facilitator is to process, elicit inferences, and make connections to real life and to future applications of the information. Attend to differences in learning styles by encouraging participants to express what they see, feel, and hear as they are learning.

As you design a training experience, pay attention to the flow of your design. Interactive experiences can seem trivial if the ideas or information they generate are not linked to practice. Experiential exercises draw their power from individual, emotional responses. They are not “complete” until the learner can explore the implications of the experience for his/her work or practice. While you do not need to pursue every comment and insight, you do have to make room for processing. If you are unsure of how to balance activity and process, you may wish to train with a more experienced co-facilitator who can model that for you.