

## NOTES ON ADVANCED FACILITATION

### TOPICS

- **Adult Learning Preferences**
- **Applications in Learning Environments**
- **Teaching vs. Facilitating**
- **Keys to Successful Facilitation**

**Before review, take a moment to consider these questions and make some notes.**

How do you learn something new?

What makes learning enjoyable for you?

And what did you discover?

### THINGS WE KNOW ABOUT HOW ADULTS LEARN

**Learning is an act of participation.**

**The depth of our learning depends on the depth of our engagement.**

We glean knowledge and retain more information from active participation in many different situations and activities. The more we are actively involved, the more our brains' hardwiring is fired-up and the more we learn. Thus, passive listening is the lowest form of engagement, next to reading information.

**WIIFM (what's in it for me) is critical.**

We want to learn subjects that have immediate relevancy to our work. If we don't get WIIFM quickly through the marketing material or at the beginning of the presentation, we disconnect and lose attention.

**Big picture first, then the details.**

We often don't return from the presenter's rabbit trails. Don't take us into the weeds, as our minds are fickle.

**Where does this new learning fit in relation to the other stuff I know?**

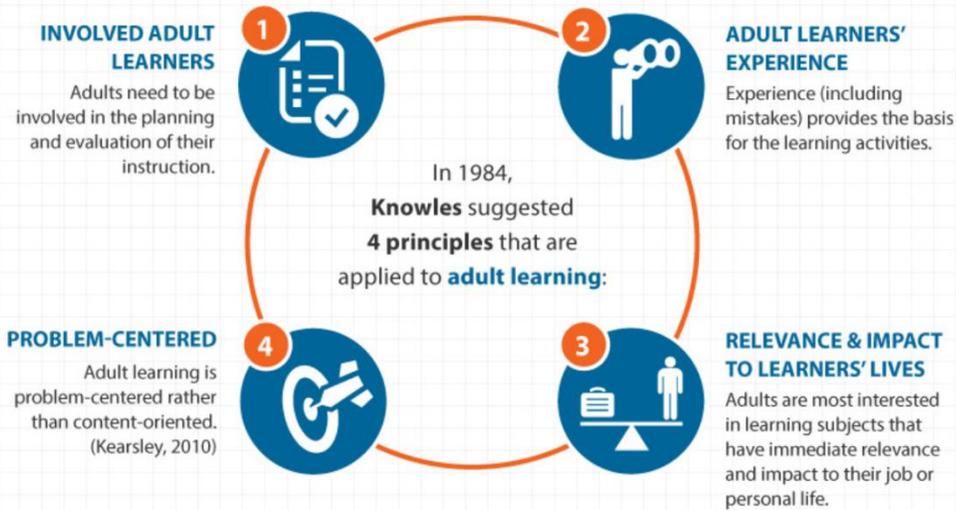
We rely increasingly on our prior knowledge, experiences, failures and successes. That's why listening to other adults' experiences help us build fresh frameworks for newly acquired knowledge

**We are problem-centered rather than content-oriented.**

Adults are oriented toward solving problems and making instant application. It must meet my relevancy factor. If your content doesn't resolve my issues, I don't care.

[https://www.corenetglobal.org/files/summits\\_events/CallforContent/pdf/AdultLearningTips.pdf](https://www.corenetglobal.org/files/summits_events/CallforContent/pdf/AdultLearningTips.pdf)

## 4 PRINCIPLES OF ANDRAGOGY



Kearsley, G (2010). Andragogy (Mknowles). The theory into practice database. <http://tip.psychology.org>

**What is active learning?** Active learning occurs when the learner is involved in more than just listening to a lecture. It involves discussion with others (not just the presenter), structured note taking, problem solving and participation in some form. Active learning also stimulates cognitive learning and the use of higher level thinking skills like analysis, evaluation and synthesis.

- It does not include participation for participation's sake.
- It means instructional activities where attendees do something and are involved in critical thinking while doing it. It does not mean punching a button on an audience response system.

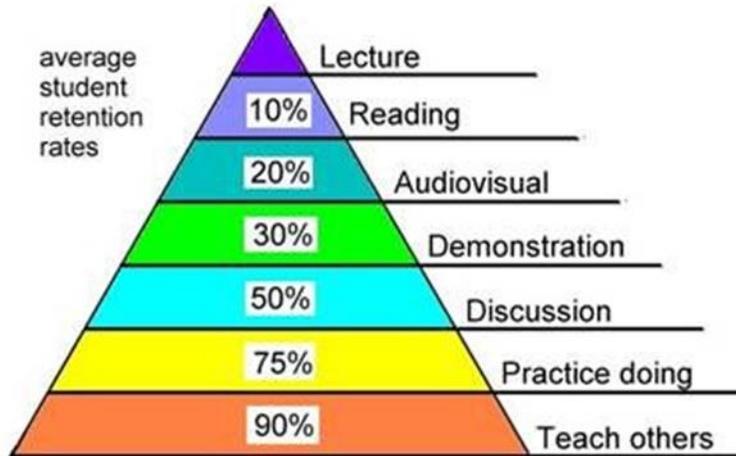
**It means transforming traditional practices like lectures into problem-based learning, collaborative, and activity based approaches with guidance from the facilitator.**

[https://www.corenetglobal.org/files/summits\\_events/CallforContent/pdf/AdultLearningTips.pdf](https://www.corenetglobal.org/files/summits_events/CallforContent/pdf/AdultLearningTips.pdf)

*Research tells us that lecturers typically speak at between 100 and 125 words a minute, but students can take note of only about 20 words a minute, often leaving them feeling frustrated and defeated.*

Lectures in Advanced Mathematics: Why Students Might Not Understand What the Mathematics Professor Is Trying to Convey. Kristen Lew, Timothy Patrick Fukawa-Connelly, Juan Pablo Mejía-Ramos and Keith Weber, *Journal for Research in Mathematics Education*, Vol. 47, No. 2 (March 2016), pp. 162-198.

## Learning Pyramid



Source: National Training Laboratories, Bethel, Maine

### Welcome to the “flipped classroom”...

*During class, learners can inquire about content, test their skills by applying knowledge, and interact with one another in hands-on activities. **During class sessions, instructors function as coaches or advisors, encouraging learners in individual inquiry and collaborative effort.***

***In a traditional classroom, learners focus on capturing lectures and there is little time to reflect –much less digest and act – on what is being discussed.***

*By devoting class time to application of concepts, instructors have a better opportunity to detect errors in thinking, particularly those that are widespread in a class setting.*  
<http://net.educause.edu/ir/library/pdf/eli7081.pdf>

### Your role changes...

#### Facilitator

Discusses  
 Facilitator participates and guides  
 Students are the center of attention  
 Small groups  
 Handouts, scenarios, group activities  
 Indirect control of class and activities

#### Teacher

Lectures  
 Information radiates out from teacher  
 Teacher is the center of attention  
 Large classroom  
 PowerPoints  
 Direct control of class and activities

**In looking at the differences, you may notice that one of the biggest changes is the change in focus from the educator to the student.** While one may argue that the students were always the “focus” of education, many educators have trouble giving up the teaching role for reasons of identity, tradition, security or even ego.

Moving from a traditional classroom to a more active style (flipped, blended or any active version) involves altering many components of your classroom. **The most challenging being the role change from teacher to facilitator.**

<http://www.emsworld.com/blog/12083494/teaching-vs-facilitating>

## KEYS TO SUCCESSFUL FACILITATION

**Great facilitators know that it requires knowledge, skills and experience.**

**Wisdom and experience in using techniques is not enough.**

**Great facilitators bring a caring persona to their work.**

### **What are these characteristics?**

**Facilitators care about people.** They value people, their views and their input. They want each person to walk away from a facilitated event feeling welcome, heard and understood. They model positive affirmation and demonstrate their caring through their words and actions.

**Facilitators want to help.** The word "facilitator" comes from the Latin word "facil" which means to make easy. Facilitators receive great pleasure from being of assistance. They genuinely enjoy using their expertise to help others succeed.

**Facilitators set their egos aside.** Facilitators recognize that they are servants of the group. They understand that their presence is secondary, that their personal views are inconsequential, and that their value is defined by their ability to help the group achieve the group's objectives, not the facilitator's. They don't get upset with a participant's difficult behaviors. They don't take concerns personally. They are willing to play as little or as great a role as necessary to help the group be successful.

Michael Wilkinson, CMF, Managing Director, Leadership Strategies, Inc.

### **Maintain an informal, relaxed, and comfortable style**

Use a conversational approach with an easy smile and a relaxed physical presence. This informality encourages participation and free-flowing ideas, allowing groups to take responsibility for their work.

When answering questions, don't position yourself as the "sage;" instead, be the "guide on the side" and say something like, "in my experience..." or "from the reading..." "this is the preferred method..."

Ask your co-facilitator for additional comments. Being authoritative and rigid defeats the informality and can create confrontations.

### **Effective facilitator comments:**

Thank you for your thoughts.

I understand what you're saying.

Let me summarize what we just heard.

Does anyone else have something to add?

### Effective facilitator behaviors:

- Smile and look at the person who is speaking or to whom you are speaking.
- Keep an open stance without crossing your arms over your chest.
- Move away from the front table and into the center of the space unless the group is so large that a microphone is necessary (in which case a wireless lavalier or portable microphone would be best to allow movement around the room).

### Read and respond to non-verbal behavior

- Watch for signs of individuals' unspoken disagreement or passive withdrawal from the group.
- Look, too, for signs of acceptance and engagement.
- Pay attention to inconsistencies between what participants are saying and what you're seeing.
- Observe nonverbal communications around the room, from eye contact to tone of voice to body language.
- Trust your instincts; if you sense confusion, for example, you may need to clarify something even though no one has asked a question.

### Some examples:

- Eye contact: Is eye contact being made? If so, is it overly intense or just right?
- Facial expression: What are their facial expressions? Are they masklike and unexpressive, or emotionally present and filled with interest?
- Tone of voice: Do voices project warmth, confidence, and interest, or are they strained and blocked?
- Posture & gesture: Are bodies relaxed, or stiff and immobile? Are shoulders tense and raised, or slightly sloped?
- Intensity: Do participants seem flat, cool, and disinterested, or melodramatic? Are they engaged with you and each other, and with the content?
- Timing & pace: Is there an easy flow of information back and forth? Do nonverbal responses come too quickly or too slowly?

### A GOOD RESOURCE FOR MORE STUDY

The screenshot shows the Community Tool Box website interface. At the top, there is a search bar, a language dropdown set to 'English', and a 'Donate' button. Below this is a navigation menu with five categories: 'LEARN A SKILL', 'HELP TAKING ACTION', 'CONNECT', 'ABOUT', and 'SERVICES'. The main content area displays the breadcrumb trail: 'Home > Table of Contents > Leadership and Management > Chapter 16. Group Facilitation and Problem-Solving > Section 2. Developing Facilitation Skills > Main Section'. The page title is 'Chapter 16' with a 'Table of Contents' link. A horizontal list of page numbers (1-46) is shown, with '2' highlighted in green. Below this, the section title 'Section 2. Developing Facilitation Skills' is displayed. On the left, there is a 'CHAPTER 16 SECTIONS' list with 'Section 2. Developing Facilitation Skills' selected. On the right, there are tabs for 'Main Section', 'Checklist', and 'PowerPoint'. The main content area contains a brief description: 'Learn how to plan well, keep members involved, and create real leadership opportunities in your organization and skills in your members.' Below this, two bullet points are listed: '• WHAT ARE FACILITATION SKILLS?' and '• WHY DO YOU NEED FACILITATION SKILLS?'.

The Community Tool Box is a service of the Work Group for Community Health and Development at the University of Kansas  
<http://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation/facilitation-skills/main>

## WHAT DO I DO? SOME TROUBLE-SHOOTING TIPS

### **Staying on-task and on-time.**

With groups of passionate and knowledgeable people, it is easy to veer off onto other topics or easily get side-tracked by minute details of a conversation. In order to help the group stay focused, you may want to:

- Remind the group of the “keep focused” expectation
- Don’t be afraid to directly re-focus the group on a particular agenda item
- Try to close the item or set it aside in a “parking lot” for consideration later

### **Dealing with unproductive behavior.**

You might be dealing with inattentive members who are engaging in side-bar conversations, taking calls or indiscreetly dealing with e-mail.

You might also be dealing with personal agendas or disrespectful behavior. Progressive intervention will most often assist you in dealing with behavior that does not help the community achieve its meeting goals or objectives.

- Use gentle and appropriate humor for redirection
- Restate the ground rules directly
- Direct your questions to the individual for clarification
- Seek help from the group
- Address the issue at a break or offline

### **Stimulating productive inquiry.**

It is not uncommon for sessions to experience lulls in an on-going conversation or a stand-still in a single event. You might want to use the following techniques to keep the conversation going.

- Use probing questions
- Invite the experts to speak up
- Call on individuals in the group
- Invite debate

## STRATEGIES IN THE NEW CFRE REFRESHER COURSE

The one-day AFP CFRE Refresher Course takes a new approach that asks participants to apply fundraising theory, skills, and techniques within the six knowledge domains of the field, based on experience at the five-year level. This course is not presented in a lecture format; rather, it is a combination of a high-level review, self-exploration of knowledge and peer exchange of best practices – all of which are facilitated by a knowledgeable fundraising practitioner.

The AFP CFRE Refresher Course offers fund development professionals an opportunity to review the main components of a complete fundraising program. It is a 10-hour, intensive program, the purpose of which is to provide an overview of skills, techniques, and program components based on fundraising experience at the five-year level. This

course is organized around the domains of the Certified Fundraising Executive (CFRE) exam rather than specific fundraising strategies. This course helps students identify gaps in knowledge by working through caselets. The course approach is a variation on the flipped classroom and blended learning

**CASELETS: a combination of Case Studies and Critical Incidents.**

- **Case studies** are written accounts of real or fictitious situations or problems. Some case studies are left unsolved so that participants can analyze job-related situations and arrive at their own conclusions. They are designed to develop critical thinking and decision-making skills. They are not intended to be prescriptive or to prove a point. Case studies may be from two to ten pages in length. For small groups, ask participants to discuss possible solutions and outcomes. Or provide a list of questions to help facilitate a conversation.
- **Critical Incidents** are similar in design to case studies, but critical incidents are much shorter, usually a paragraph in length.

**Domain Reviews:** Lecturettes- Short ten to fifteen minute lectures spoken or distributed via handouts that frame a conversation, situation or theory. Lecturettes are intended to establish some common language between presenters and attendees about a model, principle or process. They are a perfect fit before an activity or to segue into a different topic.

**Sample Caselet**

**Situation Description:**

The City has offered three arts and culture organizations with a lease-free space on the ground floor in a new commercial building being erected in the center of downtown. It will require the three organizations to partner and launch a joint campaign to raise funds to build out the space to meet their unique needs.

None of the organizations has ever conducted a capital campaign; only one of them has a major gifts program. A feasibility study has been done, and the recommendations were to proceed with the campaign after extensive cultivation with prospective major gift donors.

**Question for Discussion:**

1. What process would you use to identify potential major donors to this campaign? *Take 10 minutes to discuss the situation with individuals around you. Capture your thoughts on the flip chart.*

**What do you recommend?**

***What areas of knowledge in fundraising did you use to arrive at these recommendations?***

***How does this exercise align with adult learning expectations?***