

De Anza College

Designing & Facilitating a Workshop

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Logistics of the Facilitation Process

The following is an outline of how to set up and present a workshop, classroom, or any teaching/learning situation:

I. Facilitators need to develop and understanding of the difference is between a:

- A. Lecture
- B. Seminar
- C. Workshop

II. Getting ready to present a workshop

A. Who is the target audience?

- 1. Information level
- 2. Age range--young people, older students, professionals

B. What do they want?

- 1. Topic or subject
- 2. Be specific when making the appointment!
- 3. How long do you have for the presentation?

C. Where and when to present?

- 1. Location of workshop
- 2. Time of presentation

D. How to be prepared?

- 1. Do you need any special equipment or electricity?
- 2. Do you need and further research or material?

E. Why present?

- 1. What is your audience looking for -- purpose?
- 2. Does your material meet their needs?

III. Four Steps in presenting a workshop

A. Introduction

- 1. About yourself
- 2. Information to be covered--have clear objectives
- 3. Ice Breaker

B. Information

1. Informative/follow topic
2. Handouts are important
3. Use visuals (overheads, posters, bulletin boards)
4. Tactile objects provide “touchy feely”
5. Audio or video materials
6. Personal application

C. Participation

1. Brainstorming
2. Goal Setting
3. Exercises
4. Small groups
5. Large groups
6. Games
7. Hands on
8. Role Playing

D. Closing

1. Reinforce all high points and important facts
2. Close on a positive note!
3. Ask for questions or issues of concern
4. Always let them know where you can be reached
5. Have the audience fill out an evaluation

Styles of Presenters

A -- Humorous

B -- Serious

C -- Logical

D -- Friendly

E --Dull and Boring (NEVER)

A + B + C + D = A Great Presenter

Creating a Safe Environment

Bloom (2000), says that in your role as facilitator, you are responsible for creating a safe, non-threatening environment in which the “work” can take place. This means managing the content, process, and environment. The content of the workshop is the actual information you hope to communicate. The process includes the approaches and strategies you use to deliver the content. The environment includes the physical and psychological surroundings of the workshops session, including location, room arrangement, and tone of the training.

Before the Workshop

Do as much before the workshop as possible regarding logistics so you can put as much of your cognitive and affective attention on the group and the process as possible. To that end the following are basic checklists to accompany the facilitation section further on in the manual.

Materials needed

- Large paper and lots of marking pens of many colors
- Easels for paper and large paper
- Overhead projector with projector surface tested.
- Masking tape
- Packet for each participant
- Name tag
- Extra paper for notes and drawing exercise on day 2
- Stickers (if you are going to use this technique) and any other material needed for any of the exercises or techniques you plan on using
- Timer (may need a spare timer)

Room set-up

- Arrange chairs in semi circle with ALL participants facing and able to make eye contact with facilitator and each other. If tables are available they should be put behind the chairs. (No barriers between participants or facilitator)
- Test and ready overhead projector.
- Check that easels are secure, contain lots of large paper, and are visible from any location in the room.
- Regarding Packets. You can put one on each seat or given ahead of time However, remember if you put the packets on the chairs ahead of time people will get distracted and start going through them and may not be listening to what you’re saying in the moment. Sometimes it’s better to pass out documents one at a time as the content/issue arises within the group
- Table in front of room for materials, and facilitator’s notes, as well as extra supplies for quick accessibility. Allow for individual need, i.e. physical limitations, hearing, vision, and translation.

- Check location of bathrooms & whether snacks and beverages are going to be provided. Make sure they are in the room before the workshop starts.

The Psychological Environment. It is the facilitator's responsibility to ensure that all interactions are done within a spirit of mutual respect caring and supportive. Participants need to see themselves as partners in the experience and perceive their differences as enriching.

The Social Environment. It is the facilitator's responsibility to ensure that all participants know one another's names, that the tone of the workshop is warm and friendly and that there is an expectation of collaboration, not competition. Participants need to perceive one another as valuable resources and that all are eager to share information with one another.

The Physical Environment. Ensure the room is comfortable. The chairs should be moveable with no tables in the way. Ensure there is adequate heating and cooling. Make sure you have bathrooms and water in the room. Make sure all supplies are there and available but do not pass them out.

1. **Handouts** - ensure that all handouts are prepared in advance and that you have enough copies. Think about where this group may "go" and what their jobs are and pick extra handouts - just in case.
2. **Overheads** - if you are using overheads - enlarge the print.
3. **Large paper and pens** - ensure you have enough paper and different colored marking pens
4. **Videos** - set up ahead of time and ensure all is working
5. **Run long in the am** - Make sure that after lunch you do exercises so they don't go to sleep.

Regardless of the exercise you must choose the theory necessary to accent the affective process. Many theories overlap and have a basic fundamental underlying theory. As you develop your own knowledge base and continue your own work, integrate your own process of development. The exercises will change shape - will develop to more truly reflect who you are and the group you are working with.

In facilitating the process it is often a good strategy to move back and forth between theory and activities/exercises in order to balance the cognitive and affective aspects of the work. For example, after a major exercise has been emotionally debriefed it is extremely effective for the participants to have a review of theory or new theory presented that connects to the exercise.

Anytime emotions need to be processed constructivist listening is the foundation exercise used to have participants clarify what their issues or concerns are. Again, the facilitator takes the material the participants give and "wraps" it around theory.

Time and Silence

The mainstream U.S. culture can't stand more than 10 seconds of silence. It's extremely important for the facilitator to become comfortable with extended periods of silence. Allow the silence to work. Trust the process. Given enough time the group will "work". Getting them to work and finding the key is the facilitator's job. Being patient and compassionate with the group is also the facilitator's job. If the group / culture is not one that is introspective by nature then the facilitator needs to lay that groundwork

- explicitly. It's important to learn from the culture within which you are working what the normal length of time for silence is before someone will interrupt. When facilitators jump in too soon with more questions we disrupt the process. Different people take different amounts of time to process information and feelings. It's important to respect the cultural and personal variables associated with time and process.

Cautions to facilitators

- **Explicit and Implicit:** The more explicit the facilitator can be regarding the nature of the work involved the more buy-in you get from the participants = the more emotional work will be done.
- **Feeling emotionally ambushed:** If you forget to be explicit and the group feels you've emotionally ambushed they may rebel. They may attack you or each other and or refuse to work. They will "make you pay".
- **Leaving on a positive note:** Always leave with hope - be explicit that this is hard work and that it is a life long journey.

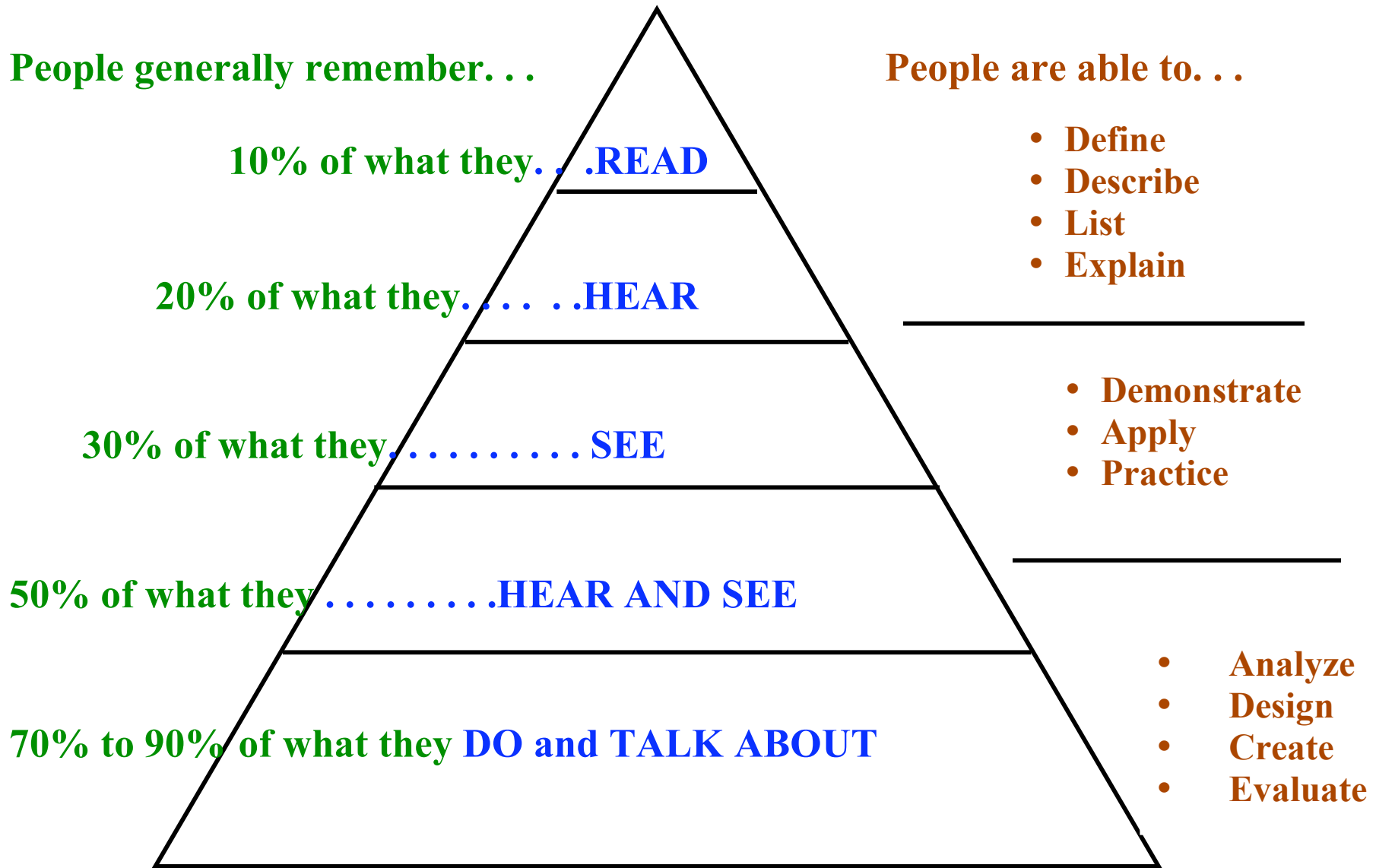
Extracted from J.V. Reza, *Training Manual Education for Social Justice: A Program for Adults* ©

Characteristics of Adult Learners

1. Adults are *autonomous and self-directed*. Adults are at various stages of autonomy, and they exercise their autonomy in learning situations. Their concepts about themselves directly affect their behavior and desire to learn.
2. Adults have accumulated a lifetime of *experiences and knowledge* that may include work-related activities, family responsibilities, and previous education upon which to draw and to share with others.
3. Adults are *goal-oriented* and seek to learn what they have identified as important rather than what others deem important.
4. Adults are *relevancy-oriented*. Adults want to know if what they are asked to learn is relevant to their needs. They must see a reason for learning something. Learning objectives must be identified before beginning and theories and concepts must be related to a setting familiar to participants.
5. Adults are problem-centered rather than subject-centered. Adults are *practical*; focusing on aspects of the learning that they determine will be the most useful to them.
6. Adults respond better when the material is presented through a *variety* of teaching methods and when information is understood through different sensory experiences.

Citations: Lieb, Stephen, [Principles of Adult Learning](http://www.hcc.hawaii.edu/intranet/committees/FacDevCom/guidebk/teachtip/adults-2.htm) at <http://www.hcc.hawaii.edu/intranet/committees/FacDevCom/guidebk/teachtip/adults-2.htm>
Cullinan, Cristine Clifford, [Institute for Diversity Trainers Resource Manual](#), The 16th Annual National Conference on Race and Ethnicity in American Higher Education, May 2003, San Francisco
Staff Development Adult Characteristics at http://www-ed.fnal.gov/lincon/staff_adult.shtml

Dale's Cone of Experience/Learning



Domains of Operation

From within the discipline of psychology it is said that humans operate in 3 domains:

1. Cognitive
2. Affective
3. Behavioral

Spiritual*

These domains are manifested in various arenas of our lives.

- Personal
- Professional
- Institutional/Societal

Structuring a Feedback Session

O P E N I N G S E T T I N G T H E T O N E & F O C U S	W H A T W E N T W E L L S U C C E S S E S ← Check for Validation →	C H E C K I N W I T H G R O U P	I N T E R N A L S U M M A R Y	W H A T N E E D S P O L I S H I N G ? ← Check for Validation →	C H E C K I N W I T H G R O U P	I N T E R N A L S U M M A R Y	C L O S U R E W I T H G R O U P & F A C I L I T A T O R
{--1 minute--}	{----- 5 minutes -----}			{-----5 minutes-----}			{---2minutes---

Notes: Checks for validation with group members is done throughout the session.

“Check in with group” = “Anything else?” before moving on.

Internal summaries are usually done either by facilitator/instructor

Closure includes highlighting one or more areas (challenges first, successes last) by facilitator/instructor and sometimes one last comment to facilitator/instructor from each group member.

When I have dared to be powerful, to use my strength in the service of my vision, it becomes less and less important whether I am afraid.

Audre Lorde

Late in the book, The Temple of My Familiar, the author, Alice Walker, has an old wise character, named Ola, who says:

"Keep in mind always the present you are constructing. It should be the future you want."

Making Change Happen

For in-depth, change to occur, it needs to take place individually (personally as well as professionally), culturally, and institutionally.

A Model of Change*

Issues		Target for Change
Who's in control? Decision making Influence Economic Political power	INSTITUTIONAL (power)	Structure Organization policy Beyond numbers Empowerment
Norms Values/beliefs Communication Style	CULTURAL	Organization culture explicit Identify own culture Appreciate others See value added in others
Who am I? Attitudes Perceptions Impact on others	INDIVIDUAL	Interpersonal learnings Individual awareness Behavioral change

* This model was developed by Bob Chin and presented at a Human Interaction workshop sponsored by NTL Institute for Applied Science, July 1985, in Bethal, Maine.

Facilitator Characteristics

What is facilitation?

What the difference between:

➤ Trainers:

➤ Presenters:

➤ Educators:

➤ Facilitators:

Cross-Cultural Facilitator Skills

1. Respect
2. Tolerating Ambiguity
3. Relating To People
4. Being Nonjudgmental
5. Personalizing One's Observations
6. Empathy
7. Persistence/Patience
8. Cognitive and Behavioral Flexibility
9. Personal Self-Awareness, Strong Personal Identity
10. Cultural Self-Awareness
11. Enthusiasm and Commitment (Passion)
12. Interpersonal Sensitivity/Relations
13. Tolerance of Differences
14. Openness to New Experiences (Risk Taking)
15. Reflection
16. Sense of Humility
17. Sense of Humor

Facilitators have...

1. **The capacity to communicate respect** - to transmit, verbally and non-verbally, positive regard, encouragement, and sincere interest.
2. **The capacity to be nonjudgmental** - to avoid moralistic, value-laden, evaluative statements, and to listen in such a way that another can fully share and explain self.
3. **The capacity to personalize knowledge and perceptions** - to recognize the influence of one's own values, perceptions, opinions, and knowledge on human interaction, and to regard such as relative, rather than absolute, for more tentative communications.
4. **The capacity to display empathy** - to try and understand others from "their" point of view, to attempt to put oneself into the others life space, and to feel as they do about the matter under consideration.
5. **The capacity for role flexibility** - to be able to get a task accomplished in a manner and time frame appropriate to the learner or person from a different cultural back ground than yours, and to be flexible in the process for getting-the-job-done, particularly with reference to participation and the maintenance or development of group morale.
6. **The capacity to demonstrate reciprocal concern** - to dialogue, take turns talking, share the interaction responsibly, and, in groups, promote circular communication.
7. **The capacity to tolerate ambiguity** - to be able to cope with cultural differences, to accept a degree of frustration, and to deal with changed circumstances and people.

The above skills and attributes have been identified by various people who train trainers (Ruben, Bennett & Bloom) as being associated with effective and competent cross-cultural facilitator skills/characteristics

Dialogue as a Process

If we try to listen we find it extraordinarily difficult, because we are always projecting our opinions and ideas, our prejudices, our background, our inclinations, our impulses. When they dominate we hardly listen at all to what is being said. . .

There is no value [in this state of being]. One listens and learns only in a state of attention, a state of silence, in which this whole background is in abeyance, is quiet; then, it is possible to communicate.

Krishnamurti

Dialogue has 3 Components:

Listening:

. . .with a willingness to be influenced
. . .as though the speaker is really wise

and

. . .as an ally. . .to learn from others different from ourselves

Suspension:

. . .is the ability to notice and temporarily suspend one's reactions, feelings, opinions, and assumptions

Inquiry:

. . .is to draw out inferences and assumptions (ours and others')

from: Frances E. Kendall Workshop on Eliminating Racism

Dialogue and Discussion: Effective Groups Practice Both

DISCUSSION...	DIALOGUE...
...is "a close examination of a subject with interchange of opinions, sometimes using argument, in an effort to reach an agreement."	...is "an interchange of ideas, especially when open and frank and seeking mutual understanding."
Discussion can be an efficient way to reach a decision in a group. However discussion alone often fails to maximize the contributions each participant can make and minimizes the learning the group can do together to create new thinking and generate original solutions.	<p>Dialogue is a collective inquiry in which we suspend opinions, share openly and think creatively about difficult issues.</p> <p>Dialogue is characterized by:</p> <ul style="list-style-type: none"> • suspending judgment • examining our own work without defensiveness • exposing our reasoning and looking for limits to it • communicating our underlying assumptions • exploring viewpoints more broadly and deeply • being open to disconfirming data • approaching someone who sees a problem differently not as an adversary, but as a colleague in common pursuit of a better solution.
EFFECTIVE GROUPS USE BOTH DIALOGUE AND DISCUSSION	
<ul style="list-style-type: none"> • The most productive discourse will flow back and forth from one to the other, from inquiry to advocacy. 	
<ul style="list-style-type: none"> • Dialogue with discussion offer the opportunity to build consensus and improve the quality of our thinking and decisions. 	
<ul style="list-style-type: none"> • Decisions arrived at through discussion without dialogue often masks unresolved conflict. 	
<ul style="list-style-type: none"> • We know that students must risk making mistakes in order to learn how to learn, manipulate information, solve problems, think critically, and work collaboratively. We support this risk taking in students when we ourselves take risks in our own efforts to learn how to improve schools and their practice. 	
<ul style="list-style-type: none"> • When groups begin in to use dialogue with discussion, the two practices need to be defined and differentiated. 	
<ul style="list-style-type: none"> • The practice of dialogue with discussion legitimizes learning from others and experimenting with new ideas. 	
<ul style="list-style-type: none"> • The practice of dialogue with discussion enables a group to arrive at decisions and make plans that are better than those of any individual. 	

Intergroup Dialogue

What is Intergroup Dialogue?

Intergroup dialogue is a form of democratic practice, engagement, problem solving, and education involving face-to-face, focused, facilitated, and confidential discussions occurring over time between two or more groups of people defined by their different social identities.

Intergroup Dialogue goals are:

- To develop a capacity for dialogue—deep listening, suspending judgments, identifying assumptions, and reflection and inquiry.
- To reflect upon and learn about self and others as members of social group(s) in the context of systems of privilege and oppression.
- To explore the similarities and differences in experiences across social group memberships.
- To gain knowledge and understanding of the dynamics of difference and dominance at the personal and political levels.
- To develop skills to work with differences, disagreements and conflicts as opportunities for deeper understanding and transformation.
- To identify individual and collective actions for interrupting injustices and building alliances to promote greater social justice.

(pg. 120)

Intergroup dialogue is:

1. Dialogue is a process not an event.

A dialogue that continues over weeks or months allows participants to work through stages of growth, change, conflict, friendship, and anger, uncovering new layers of understanding and insight (Adams, Bell, and Griffin 1997). (p. 6)

2. Dialogue is about relationship building and thoughtful engagement about difficult issues.

Dialogue involves in-depth conversations about competing perspectives. It requires face-to-face conversations about competing perspectives. It requires face-to-face engagement and attention to relationship building across groups, within groups, and between individuals (Dalton 1995; Hubbard 1997). (p. 7)

3. Dialogue requires an extended commitment.

When people participate in an extended dialogue, they begin to realize that it is only through a long-term commitment that our racial and other divisions will be fully addressed. [D]ialogue over at least several weeks of time for the following reasons: (1) it allows for building more trusting relationships, (2) it provides time to process issues between sessions, (3) it permits attention to the complex layers of issues, (4) it provides

opportunity for outside reading related to the topic, and (5) it teaches that change requires long-term commitment. (p. 7)

4. Dialogue takes place face-to-face.

Meeting face-to-face is required to create the safe environment needed for building trust and confidentiality for dialogue (Zúñiga et al. 1995) (p. 8)

5. Dialogue takes place best in an atmosphere of confidentiality and issues of sponsorship and context are important to its success.

A dialogue takes place in the moment, and what one says and hears is not for the purpose of gaining advantage with anyone outside the dialogue group. . . .In a dialogue, listening is essential, and saying words from both the heart and the mind is paramount (Schoem 1995.) (p. 9)

6. Dialogues often may focus on race, but they also address multiple issues of social identity that extend beyond race.

Intergroup dialogues cross the boundaries of individual and group identities and experiences. It is important for each participant (1) to acknowledge his or her social group identities and those groups' roles in society and, (2) at the same time, to affirm his or her own individuality within and across social groups, and (3) to recognize commonalities across social groups. A dialogue that focuses exclusively on the individual and intrapsychic processes ignores social structural conditions of power and place in society. At the same time, dialogue processes that ignore participants' individual identities by insisting exclusively upon group and/or subgroup identities also deny the unique character of people's lives and diminish opportunities for personal growth and change. . . .therefore, the participants may experience the dialogue as a mix of intellectual, political, conceptual, relational, and intrapsychic processes. (p. 10-11)

7. Dialogue focuses on both intergroup conflict and community building.

Dialogue groups provide an opportunity for participants to engage issues of conflict in a safe, structured environment (Hubbard 1997). (p. 12)

8. Dialogues are led by skilled facilitators.

Dialogues are a difficult, complex social process, and without the careful attention of skilled facilitators they can go badly (Nagda, Zúñiga, and Sevig 1995). . . .Attempts to shortcut the training process are likely to decrease the chances for the success of the dialogue group.

9. Dialogue is about inquiry and understanding and the integration of content and process.

The dialogue process involves challenging ideas, listening to other viewpoints, and gaining new insights. It requires intellectual, social, and personal reflection.

10. Dialogue involves talking, but taking action often leads to good talking, and dialogue often leads to action.

Many people find that communication is enhanced when groups of people work together on a joint task or project. Having a concrete experience in common allows people to bring the real-world activity of the task to enrich the dialogue and allows the frank discourse of the dialogue to enhance the work of the project.

Extracted from: Schoem, D. and Hurtado, S. (editors), (2001), *Intergroup Dialogue: Deliberative democracy in school, college, community and workplace*; Michigan, The University of Michigan Press

Asking Questions Is The Key

Asking *questions* is the key to dialogue. Through inquiry participants are led from surface descriptive thoughts, through personal feelings and interpretations of experiences, to critically reflect on information in order to create transformative empowering action (Ada).

Imagine being in a faculty meeting, team meeting, department meeting - some place where a complicated issue or problem is being explored through dialogue. If good in depth inquiry has occurred you may hear the idea presented in a way that addresses the following questions:

- Here is my view and how I arrived at it. How does it sound to you?
- Do you see gaps in my reasoning? What have I missed?
- Do you have different data?
- Do you have different conclusions?
- What part of the problem have I not addressed?
- Is there an underlying problem?

When someone has questions or presents a different idea we might hear:

- How did you arrive at your view?
- Are you taking into account something different from what I have considered?

When someone appears hesitant to express his / her view we might hear:

- What is it about this situation, or me, or others, that is making it hard to have an open exchange?
- What can we do about that obstacle?

As the dialogue and reflection deepen you might hear colleagues, friends, or family members moving from one level of consciousness to another as conscientização occurs (chart on next page.) You might witness people moving in and out of different levels of emotional response to dialogue. Embracing and understanding how the release emotional energy clears the mind and enhances thinking is another element of dialogue (see chart on page 22). Staying present, engaged in our own praxis and being supportive of all engaged in the dialogue process is the goal (see chart on page 23).