FACILITATING LEARNING **IN GROUPS**

A Resource Manual for Facilitators working in Health and Social Care

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Feidhmeannacht na Seirbhíse Sláinte
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It is a successor to a 2009 version of a Resource Pack for Healthcare Professionals “Organising and Delivering an Education Session” written by Sinead Ronayne, Miriam Bell, Ceire Rochford, Joan Gallagher, Eithna Coen, Margaret Conway, Cathriona Greene and Lorraine Murphy and produced by the Centre of Nurse Education and Nursing and Midwifery Planning and Development Unit in HSE South (Carlow, Kilkenny, South Tipperary, Waterford, Wexford).

Table of Contents

FOREWORD

The Office of the Nursing and Midwifery Services Director (ONMSD) has developed a comprehensive *National Facilitators' Education Programme* for clinicians who wish to develop their knowledge and skills in the delivery of short in-service education programmes in health and social care and related settings. The course, which is approved by the *Nursing and Midwifery Board of Ireland* (NMBI), expands their repertoire of teaching, learning, facilitation and assessment skills in order to promote excellence through evidence-based practice amongst Nurses, Midwives, Health & Social Care Professionals, Service Users, Family Members, Carers and Volunteers who facilitate education programmes. This ensures that facilitators have a better understanding of what is required to compile and deliver knowledge and skills-based training to others.

As programme facilitators, clinicians have significant knowledge in their area of practice. However, developing the skills to communicate the appropriate information at the right times, while utilising the correct methods, requires additional skill. In order to support the National Facilitators' Education Programme, this resource manual ***Facilitating Learning In Groups: A Resource Manual for Facilitators working in Health and Social Care*** has been developed to support facilitators across the HSE, our partner agencies and in the community in the development, delivery and evaluation of high quality in-service and continuing education programmes within the health service.

The Manual comprehensively addresses adult learning, group facilitation, online learning and co-facilitation, focusing on the co-production, co-delivery and collaborative evaluation of education programmes.

I wish to acknowledge and thank Mary Manning, Director/National Nursing Lead for Dementia and James O'Shea, Director, Nurse Education (Mental Health) who chaired and led out on this project. As this Manual is the product of a collaborative process, I would like to acknowledge the working group (see overleaf for details) for their input and expertise in the development of this resource. In particular I would like to thank Linda Kirwan (Education Officer) who acted as project manager for the process.

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May 2016

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FACILITATING LEARNING IN GROUPS:

A Resource Manual for Health and Social Care Facilitators

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1. INTRODUCTION

WHAT DO WE MEAN BY FACILITATING LEARNING IN GROUPS?

There are three keys words in the title to this Resource Manual, "facilitating", "learning" and "groups". Of course, you already have some understanding of these terms. But just to ensure that we all have the same understanding of the terms from the outset, here's the working definition of each that is the basis for this Manual:

> ***Facilitation*** *is the act of making something easier. It comes from the Latin word for 'easy' which is facilis (if you studied French at school, you may remember the French for 'easy' is facile). So, to facilitate someone is to make something easier for them. In this instance, of course, we are talking about the facilitation of learning. Facilitation is also about movement, about making it easier to get from A to B (Hunter et al, 1996). However, not all facilitation is equal: the skills associated with the facilitation of learning are different to those associated with the facilitation of problem-solving.*

most things are difficult before they are easy.

> ***Learning*** *has many definitions, often depending on the stance or perspective of the person doing the defining. Here we are using a fairly generic dictionary definition: learning is* **"***the activity or process of gaining knowledge or skill by studying, practising, being taught, or experiencing something" (Merriam-Webster dictionary).*

> *In the context of this Manual, we will be talking about learning in* ***groups*** *as it is group sessions that are the main focus here. Groups can include random collections of people who come together for the purpose of attendance at an educational session, people who work in the same place, service-based teams, or any combination of more than two people who are learning together. Learning in groups can be different to learning solo, as the interpersonal dynamics of the group can enrich the learning of its individual members or, if not handled well, can present a barrier to learning.*

The purpose of this Resource Manual is to help anyone working in health who is hoping to pass on knowledge, skills or behaviours to groups of staff or to any other relevant groups in relatively structured sessions (workshops, short seminars, educational or training sessions, continuing professional development sessions, etc.). It is expected that the majority of users of this Resource Manual will be healthcare staff who have a degree of clinical or service-related expertise. These healthcare professionals may, in some cases, be co-facilitating with service users or advocates and the Manual may be of relevance to these service users/ advocates too (especially Section 5).

Of course, it would not be reasonable to expect that a Resource Manual on its own could provide all the competency development that is required to enable healthcare professionals or service users to become fully confident and effective facilitators/educators. For this reason, this Manual is designed as a complement to attendance at a facilitator training workshop, where 'trainee facilitators' are afforded an opportunity to put their learning into practice. If you have already acquired a lot of prior experience of delivering educational or training sessions, the Manual may help you to build on and augment this experiential learning.

WHAT IS THE DIFFERENCE BETWEEN FACILITATION AND EDUCATION / TRAINING?

In practice, the words facilitation, education, training and even teaching are often used interchangeably to describe the same thing: helping people to learn. Facilitation is a slightly more 'modern' term and reflects a general change in education in the last century away from teacher-centred learning to student- or learner-centred learning. Changing the orientation in this way results in a very different "classroom" experience for all. Some of the differences are summarised in the following table:

TEACHER / EDUCATOR	FACILITATOR
The expert – lectures, conveys knowledge/information	Builds on learners' existing knowledge - discusses
One-way flow of information out from teacher	Facilitator interacts, listens, steers
Teacher is the centre of attention	Learners are the centre of attention
Typically, large classroom	Typically, a mix of plenary and small groups
PowerPoint or lecture presentations	Hand-outs, scenarios, role-plays, group activities
Direct control of class and activities	Indirect control of class and activities

The difference between teaching and facilitating is less polarized and may even be thought of as a continuum of styles rather than entirely distinct approaches. Equally, when it comes to some of the more business-like language of 'presenting' versus 'training' versus 'facilitation', they can be more about style than absolute differences (see Figure 1 below).

Of course, the desired outcome should inform which approach is chosen: learning a new skill is not likely to result from listening to a presentation only. Equally, a facilitated discussion may not be the best way of imparting information to large groups of people about, for example, new clinical pathways.

Figure 1: Presenting, Training and Facilitating: a continuum of styles

To summarise, this Resource Manual is designed to help you become a more effective facilitator of people who are learning in groups. It is intended to augment any experience you might already have of working with groups, of presenting, of helping people to improve their performance, or of giving feedback.

2. ADULT LEARNING

HOW DO PEOPLE LEARN?

> ***One must learn by doing the thing; for though you think you know it, you have no certainty, until you try.***
>
> *Sophocles (c. 5th century BC) 'Trachiniae'*

Imagine you get a new smart TV, your first Wi-Fi-enabled TV. It's sitting on your living room floor, in the box. What do you do next?

For some people, they will be dying to just open the box, take the TV out, plug it in and turn it on. "How wrong can it go?", they'll ask. They will then read the on-screen instructions about connecting it to their modem and then start using the remote control to figure out what to do next to get their favourite Netflix shows.

Other people may adopt a different approach. They may have begun by checking with other people (friends, sales staff, etc.) about their experiences of setting up and using smart TVs. They may notice and admit to the family that they are a bit nervous about the whole process. They may take the TV manual out of the box first and read it before unwrapping their shiny new TV. Or they may take the manual out of the box, baulk at the size of it, judge that they already know enough about TVs, and just decide to plug it in anyway and see what happens.

Which of these ways is the best way of learning how to use a smart TV? Do any of them strike you as "that's what I'd do"? Any of them seem mad to you? Interestingly, according to current theories about how adults learn, all of the above ways can contribute to learning (about using a smart TV or anything else) because they are all aspects of how adults learn.

David Kolb (1984) is one of the most well-known writers on adult learning, and his fame comes from his "adult learning cycle" in which he highlighted the need for experiential learning (learning-by-doing) as well as more theoretical learning (learning-by-thinking). Kolb's learning cycle, as adapted by Senge *et al* (1994), is below.

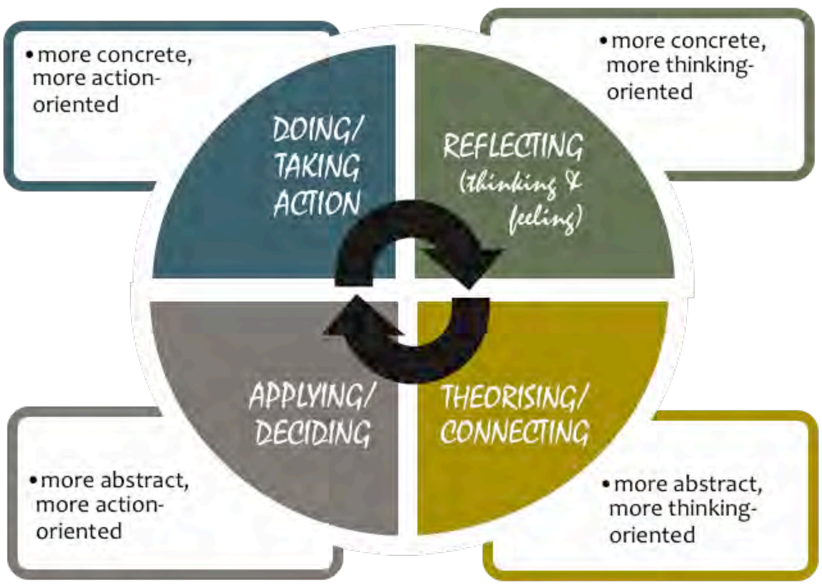


Figure 2: the learning cycle (Kolb (1984) with adaptation by Senge *et al* (1994))

REFLECTING (thinking & feeling)	Observing experience as it happens, mulling over past experience, or speculating about what a prospective experience might be like. "What was that like?" or "what might it be like to…?" are reflective questions. Other reflections might be "what did (or would) that feel like, to me, for others…?", "what was I expecting?", "how did that go?", etc.
THEORISING/ CONNECTING	Creating ideas and possibilities, analysing issues using mental models to help understanding. Linking an experience to previous similar or dissimilar experiences, looking for patterns of behaviour in a system. Generating hypotheses or working models of things, making sense of things through theories, frameworks, etc. and drawing conclusions about how things work.
APPLYING/ DECIDING	Settling on a course of action. Having thought about things in both a reflective and a more analytical way, now is the time to decide on what to do about it. "So, what does that all mean for me now?" or "so, what are we going to do now?" or "so, what are our options?" are the kinds of question that occur in this part of the learning cycle.
DOING/TAKING ACTION	Taking action, performing a task, doing something on the basis of your reflection, connective thinking and decision-making. 'Walking the talk.' Moving from intention to action. Ideally, having taken some action, you would then move back to reflecting on that action ("how did that work out?").

Senge *et al* (1994) suggest that learning begins at the reflection stage and then moves from there. This, they say, is especially useful in stopping us from just jumping into something and encourages us to be more mindful. Kolb (1984) suggests that we learn most efficiently and effectively when we are given (or take) opportunities to engage in all aspects of the cycle. He even suggests that we can learn something in all four stages so, in a way, we can start anywhere and still learn fully if we go around the full cycle. So, to go back to our TV scenario, we can learn by reading the accompanying manual first or later, and we can learn by plugging it in and trying to figure it out. We will learn best when we read about it, think about it and try it out in practice.

LEARNING STYLES

Most of us have a preference for learning in some ways more than others. Some people love reflecting, some love theorising, some prefer to move straight to deciding what needs to be done and getting on with it. Honey and Mumford (2006) developed a questionnaire to help people to identify their preferred ways of learning – this questionnaire is heavily based on Kolb's work on experiential learning. (This questionnaire is licensed and available from TalentLens (talentlens.co.uk). It may be possible to find a free version online, or your HR department may be able to source it for you if you are interested in finding out your preferred style.)

Honey and Mumford identified four learning style preferences:

Reflectors - Prefer to learn from activities that allow them to watch, think, and review (think things over) what has happened. Often like to use learning logs/journals.

Theorists - Prefer to think problems through in a step-by-step manner. Like lectures, analogies, systems, case studies, models, and readings.

Pragmatists - Prefer to apply new learning to actual practice to see if it works. Like laboratories, experimentation, and simulations. Like feedback and linkages between the task-in-hand and a problem.

Activists - Prefer the excitement of new experiences, involvement with others. Like anything new and often prefer novelty and variety to repeated practice.

While many people have strongly preferred ways of learning, most people will have a mix of all four of the above preferences. In other words, they have *some* capacity to learn in all four ways. This is important because it suggests that, **in order to facilitate adult learning, we need to give people opportunities to learn in all four ways.** This explains why we no longer rely on the 'chalk-and-talk' approach to training and education, why lecturing and didactic teaching are augmented by individual and small-group opportunities for discussion and reflection, and why learning is frequently supplemented by 'take-away tips' (such as these *SO WHAT* boxes) that help people put things into practice.

Another approach to looking at people's preferred way of learning is the **VARK** model (Fleming, 1987). In this model, learners are identified by whether they have a preference for **V**isual learning (pictures, video, diagrams), **A**uditory learning (music, discussion, lectures), **R**eading/writing (making lists, reading textbooks, taking notes), or **K**inaesthetic learning (moving, hands-on activity, experiments). Fleming points out that learners are 'multi-modal', that is, they do not learn in one way only.

Figure 3: V A R K learning styles

- **Visual** learners learn best by seeing. Graphic displays such as charts, diagrams, illustrations, hand-outs, and videos are all helpful learning tools for visual learners. People who prefer this type of learning would rather see information presented in a visual rather than in written form. People who like visual learning often remember things better when they have seen them.
- **Auditory** learners learn best by hearing information. They tend to get a great deal out of lectures and are good at remembering things they are told. They prefer to listen to class lectures rather than reading from the textbook, and they often discover early on in life that reading things aloud helps them to remember information. As adult learners, they may prefer to listen to a podcast rather than going over notes.
- **Reading / Writing** learners prefer to take in information displayed as words. Learning materials that are primarily text-based are strongly preferred by these learners. They often find that reading a textbook and making notes are the best ways for them to learn new information. They like overheads and handouts.
- **Kinesthetic (or tactile)** learners learn best by touching and doing, by hands-on experience. They often enjoy performing tasks that involve directly manipulating objects and materials, and they like applied activities such as simulations and opportunities to practice things.

For facilitators of adult learners, therefore, **it makes sense to give people an opportunity to learn in different ways.** You are unlikely to know in advance what are the preferred learning styles of the people you will be facilitating, but it is reasonable to anticipate that you will have a mix of styles in the room and that people can learn in more than one way (seeing, hearing, reading, doing, etc.). For example, someone might be strongly Auditory and yet also appreciate good hand-outs that they can refer to later. It can be useful to know your own preferences, as a facilitator, as this is likely to be your bias in structuring learning sessions.

MULTIPLE INTELLIGENCES

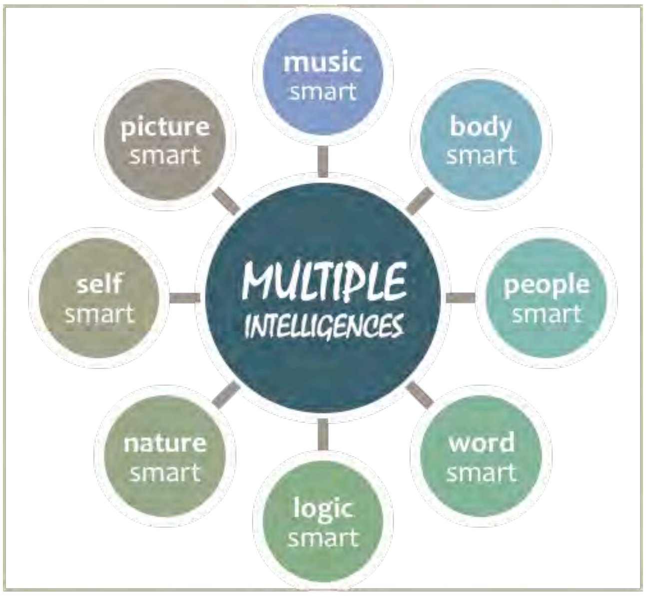


Figure 4: Gardner's Eight Intelligences

In the case of both of the above models of learning styles, we are cautioned to exercise care about pigeon-holing people as being one 'type' of learner or another, as people are not limited to just one way of learning. This pluralistic approach is the basis for the work of another major writer on learning, Howard Gardner.

Gardner is a psychologist who is interested in human potential and especially the blend of capabilities and skills (intelligences) which people throughout the world use to learn and to solve problems. Intelligence, for Gardner, is a capacity to solve problems or to make valuable products and has been central to human development down through the ages. Gardner (1983, 2003) is famous for identifying eight **Multiple Intelligences** to date. There is a possibility that he and his colleagues will be able to find evidence for a ninth intelligence, relating to moral reasoning/ethics, though this has yet to happen.

Gardner's work was ground-breaking as it moves us out of the narrow definition of intelligence as being just about 'reading, writing and arithmetic'. Within education, it has given teachers and even parents a much wider perspective on a child's strengths and has allowed them to build on and celebrate each learner's range of intelligence. Gardner's eight intelligences are described below. You will notice that there is some overlap with the Fleming's VARK model of learning styles.

BODILY-KINAESTHETIC	Body smart: learning through movement, touch, feeling and expressing things physically, being hands-on.
INTERPERSONAL	People smart: the capacity for learning through cooperation, interaction and relating with others – empathy and understanding the feelings and needs of others
VERBAL-LINGUISTIC	Word smart: being able to absorb information through speaking, hearing and seeing words – using language to get one's needs met
LOGICAL-MATHEMATICAL	Logic smart: Deductive reasoning, being able to categorise and classify, exploring the logical patterns and relations between things – able to use numbers
NATURALISTIC	Nature smart: being able to see how nature works, see the patterns, distinctions and relationships between natural phenomena without using other intelligences
INTRAPERSONAL	Self smart: the capacity for self-awareness, for self-sufficiency – understanding one's own thoughts and feelings with clarity
VISUAL-SPATIAL	Picture smart: the capacity to learn by visualising, drawing and designing, thinking in three dimensions (3D). Excelling through puzzles, maps and charts.
MUSICAL	Music smart: the capacity to appreciate, respond emotionally to, detect rhythmical patterns and create music. Using music to stimulate thoughts and associations.

The theory of multiple intelligences expands our horizon of available teaching/learning tools beyond the conventional linguistic and logical methods (e.g. lecture, textbooks, assignments, formulas, etc.). Once we allow ourselves to see beyond the conventional intelligences, we can teach or learn in a much more exciting range of ways, even when the subject-matter is as dry as economics! For example, if you were helping a group of learners to learn about the law of supply and demand, you might give then some reading to do (linguistic), offer mathematical formulas that express this law (logical-mathematical), present it in a graphic illustration or diagram (visual-spatial), find opportunities for observation of the law in the natural world (naturalist) or in the human world of commerce (interpersonal); examine the law in terms of one's own bodily responses to hunger and the supply and demand for food (bodily-kinaesthetic and intrapersonal); and/or identify songs that offer insights into the law (think of Abba or Kanye West…).

SO WHAT

Again, the message is clear: for facilitators of adult learners, **it can greatly enhance people's learning if they are given opportunities to learn in different ways, ways which work for them.**

For example, if you were helping people to learn about how to be a better facilitator, there are many ways in which you could do this, based on the Multiple Intelligences identified above.

Here are some ideas, based on the example of helping people to learn about facilitation:

- Give 'trainee facilitators' an opportunity to feel what it is like to stand in/work from different parts of the room (bodily-kinaesthetic)

- Help them get comfortable writing and representing ideas on overhead displays and flipcharts (visual-spatial, bodily-kinaesthetic)

- Explain the theories and principles (verbal-linguistic)

- Encourage them to think about how seating patterns can impact on behaviour (visual-spatial, interpersonal, naturalistic)

- Encourage them to reflect on their own experiences and feelings of working in groups (intrapersonal)

- Get them to write a piece of rap music about it (musical, verbal-linguistic)

- Encourage them to generate their own cause-and-effect 'rules' based on facilitator style and participant reactions (logical-mathematical).

OTHER FACTORS WHICH CAN IMPACT ON LEARNING

In addition to the learning styles and intelligences that are mentioned above, there are many other factors that can help or hinder learning, some of them even unconscious. People arrive into a learning situation with all sorts of characteristics, memories, emotions, and other "baggage", all of which can play a large role in their capacity to learn at that time. Of course, no facilitator of learning can be expected to know everything about which of these factors might be in play at any given time for the individual learners that they are working with. But there are some general things to watch out for as, in many cases, steps can be taken to minimise or capitalise on them.

MOTIVATION, INTEREST, READINESS

We all know how much easier it is to do something when we want to do it, how much harder it feels when it has been imposed on us. Equally, we know that there are times when we are more ready for learning, when we have an appetite for it, when we are actively seeking it to meet a need, and times when we're just not that bothered or able for it, for whatever reason.

FACILITATING LEARNING IN GROUPS

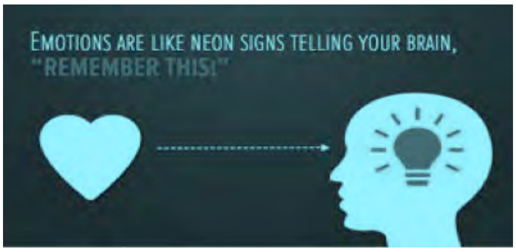
When facilitating learners, much of this may be out of our direct control. But there are some things that facilitators can do so that, in as far as possible, they are working with instead of against the grain.

Allow people to self-direct – one of the pioneers of 20th century American education was Malcolm Knowles (1975) whose work on adult learning ('androgogy') led him to suggest that people learn much better when they can self-direct in their learning, in other words, when they choose what and how to learn. Within structured programmes, this can present a challenge – Knowles' work was based largely on informal adult learning. Yet we know that much of the motivation for adults to learn is intrinsic (comes from within) and so it makes sense to build on this by helping adults to self-direct through identifying their own learning needs, building on their preferred learning styles, and helping them identify ways in which they can deepen their own learning through forming an action plan that is customised to their needs and prior experience.

Allow people to self-select for any learning opportunities. Choice is important to all of us, and the simple act of choosing something is inherently motivational. Allowing people to select themselves for participation in learning activities is also a form of self-direction (see above). Note, however, that there are times when you may have to strongly encourage people to step out of their comfort zones (i.e. times when they may not feel ready to learn) – for example, when inviting someone to take part in a role-play. Be careful that this 'strong encouragement' in a group setting doesn't effectively rob a person of the freedom to choose.

Pay attention to energy and attention span. People, including you, will vary in the amounts of energy they have available to them at any given time. Energy (too much or too little) can really impact on our ability to be present, to our attention span. Whereas there is some truth in the rule that there are general times of the day when people have more or less energy (people are often said to be "fresh" in the morning and to dread the post-lunch "graveyard shift"), it makes a lot of sense to check in with people on a regular basis as to their current energy levels and any changes they need to make if they find themselves with too much or too little. Frequently, people will self-direct to change their energy levels (move, stretch, take a 'nature break', get some water or coffee, etc.) if they are given the opportunity.

EMOTION



Emotions have a profound impact on what we learn and retain. Recent developments in neuroscience enable us to know and understand that emotion, especially those emotions associated with survival such as anxiety/fear and stress, can impede cortical activity – such is the power of these emotions that they can force us to stop thinking and prepare for flight, fright, fight or freeze. Equally, we know that emotion can also enhance memory – most people have very good recall of emotionally-charged events, events such as their wedding day, the day a child was born, how a great schoolteacher made them feel, and even where they were on 9/11.

A little stress can help learning. When we begin to feel stressed, adrenalin is released and this can sharpen our focus and our ability to attend. So a learning intervention should move people somewhat out of their comfort zones. However, too much stress, and we become so flooded with adrenalin that we can no longer think clearly enough to learn because our bodies are prepared simply for that flight, fright, fight or freeze response.

So what can facilitators do to work with adult learners' emotions? Whilst accepting that the facilitator is not responsible for the emotions of participants, there are some things that a facilitator can do to minimize the unwelcome disturbance that emotion can sometimes bring in its wake. For example, facilitators can make sure to get the pacing right (too fast or too slow can cause stress), allow fun to be part of the learning process (helps put people at ease), ensure the safety of the group through ground rules, etc. (helps participants avoid fear), and both model and give permission for people to make mistakes and ask 'dumb' questions (making people feel shame or humiliation is a real barrier to their learning).

Facilitators can also encourage people to take risks, to try new ways of doing things and to make it as safe as possible for them to do so (for example, asking people to role-play in front of a large group might be too stressful for people, but they may be happy to role-play simultaneously in small groups). If you are in doubt as to whether people are emotionally under- or over-charged, simply check in with them.

PRIOR KNOWLEDGE

Prior knowledge can help or hinder our learning (acquisition of new content). Knowing a bit about something provides a mental hook for the lodging of new information and is the basic building block of content and skill knowledge (Campbell and Campbell, 2009).

Sometimes, we don't even know what we know and yet this 'unknown' background knowledge can impact on our learning. For example, let's assume we are trying to learn to speak Swahili, a language we know very little about. We might start off by thinking about what we know about where Swahili is used (Kenya, Tanzania, etc.), or what we know about how languages are formed/structured in general (grammar, word order, etc.). Thus, our learning of Swahili would be sitting on some foundation of our prior knowledge of language and possibly our knowledge of some African culture! But if, for example, our prior learning of languages had been very painful for us, or if we had some other difficult associations with east Africa or countries where Swahili is used, this prior learning could impede our ability to learn it.

Of course, facilitators of adult learning cannot know in advance what background learning that participants will have acquired. But they would be well-advised to try to **build on whatever positive prior learning** that people have experienced. In practice, **facilitators can help people to access their prior knowledge** by simply asking, at the beginning of a learning session, a few general questions about the subject. These questions can be very broad and open-ended, such as "so what do we already know about this?" or "what assumptions can we make about this?" or "what do we need to know about this, and why?". The questions can be put to the group as a whole, or the group can be split into smaller groups to consider the questions.

CLARITY AND NEED

When we are clear about what we want and when the want or need has been identified *by us*, we are able to focus our minds more on learning whatever it is we need to learn. Thousands of euros are spent each year by organisations putting on courses and offering workshops that are quite poorly attended. The poor attendance arises, at least in part, because people don't choose to learn something new until they can see an immediate need and/or benefit to themselves to acquiring this new competence. A flip side of this is the 'use it or lose it' phenomenon whereby many newly-acquired skills wither and die because they were learned at a time when there was no need or opportunity to use them. Imagine, for example, learning how to use a new software package and then not having access to it after the course… your knowledge of this new software would, in all likelihood, very quickly atrophy.

Sometimes, learning 'failures' arise simply because of poor timing (for example, a need to learn how to make a Christmas pudding is probably not going to be sharply felt in May or June). Sometimes, it is about knowing what we want or need and being involved in decisions about how to meet that learning need. An all-too-common feature of life in organisations is where people show up at learning events, such as workshops, but they don't really know why they are there (apart from "because I was sent").

The key issue in this for facilitators is to try to **help people to sharpen their focus on their needs/wants at the outset of any learning intervention**. This can be done at the start of a workshop by inviting people to identify what they'd like from the workshop. Another way is to get them to identify a situation where they found themselves at the mercy of events because they did not have a specific skill or did not know how to do something… for example, if people are attending a workshop to learn how to deal with patients' families, invite them to think of the last time they did not know what to do with a particular family member who was looking for support. Then ask them "so what would you like to have been able to do?" or "so what skill do you think you were missing then?". (Of course, if people find themselves at learning events because their manager sent them, they should be encouraged to talk to that manager to find out why they manager thinks they might have benefited from taking part!)

The more you can help participants to sharpen their focus on their need, the more you are tapping into their motivation to learn. It also makes it easier for you to tailor the content to their needs.

THE PHYSICAL ENVIRONMENT

People learn better when they are comfortable, when their physiological needs for safety, warmth, sustenance, and belonging are met. As Maslow (1943) says, we cannot self-actualise (grow, learn, develop) if our focus is on meeting our need for physical and emotional security. The physical environment for learning is important, then, in terms of helping people to feel comfortable, safe, and part of a group. This includes attending to obvious aspects of the environment, such as temperature, furniture, lighting, and food/ refreshment, but also thinking about how we arrange the seating, and whether we have tables for people to work at or whether we go with seats alone.

Figure 5: Maslow's Needs Hierarchy

The next Section of this Manual will cover this topic in greater depth.

A USEFUL REMINDER OF HOW TO HELP PEOPLE LEARN

Although almost 30 years old, the following list of 'nine events of instruction design' (as described by Smith *et al,* 2015) is still a good way of ensuring that learners can use a multiple of styles and are motivated and supported in meeting their learning needs:

1. ***Gain the learner's attention.*** *Connect the learning to something attractive, of interest or of relevance to the learner.*
2. ***Describe the goal.*** *Give the learner a clear picture of what they will be able to* ***do*** *with what they learn.*
3. ***Stimulate recall of prior knowledge.*** *Help learners to link what they already know with the new learning. This will help learners be less anxious too.*

4. ***Present the material to be learned.*** *Use a variety of approaches to help learners use a mix of learning styles and intelligences.*

5. ***Provide guidance for learning****. Help learners to think about how they learn and how they use their learning – this deepens learning and ensures it is not simply 'rote' or 'mechanistic' copying of others.*
6. ***Allow for performance 'practice'****. Give learners an opportunity to try out, apply, simulate or demonstrate how they might use the learning.*
7. ***Provide informative feedback****. Give the learners a sense of how they are doing – either through peer review and feedback or instructor feedback.*
8. ***Assess performance.*** *Test if the 'lesson' has been learned. Find a way to evaluate the learning.*
9. ***Enhance learning and retention.*** *Help learners to see how the learning might have value in a wider range of applications/settings/problem situations.*

Finally, one model which can bridge learning ***and*** teaching (or helping people to learn) is Eisenkraft's (2003) '**7E**' model. This model has its origins in research dating back to the 1960s on how best to teach science. It started life as just three 'Es' but has become more sophisticated over time. In reality the process is not linear, as facilitators of learning are engaged in many of these activities repeatedly and at several points throughout a learning session.

- **E**ngage – Promote the learner's curiosity, focus their attention, help people to make connections with their general prior knowledge.
- **E**licit – Find out, bring forth and build on what people already know (their prior knowledge).
- **E**xplore – Encourage learners to identify their conceptions and beliefs, to share experience and to collect data/evidence directly (through experimentation) and indirectly (through consideration).
- **E**xplain – Help learners use the data to address problems, formalise some working models of what might be going on and why, and introduce them to concepts to help them make sense of things.
- **E**laborate – Help learners to transfer and apply new concepts and information.
- **E**xtend – Find ways of ensuring that learners transfer the knowledge/skills to new domains, help them move beyond the specific (learning) need to more widespread application.
- **E**valuate – Assess the learning to see if it has been acquired and applied.

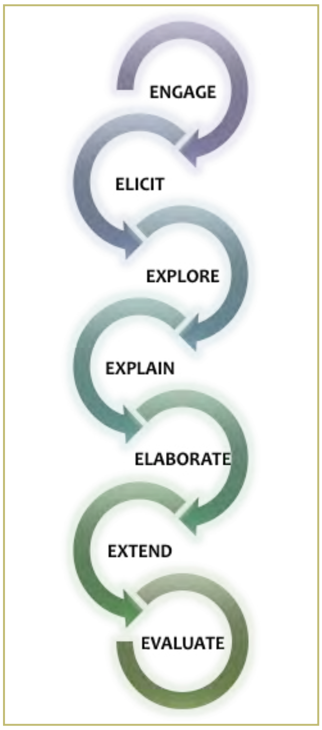


Figure 6: 7Es of Helping People to Learn

3. FACILITATING LEARNING IN GROUPS

3.1 - BEFORE THE LEARNING SESSION – PLANNING AND PREPARATION

We know that one of the most significant secrets to success is preparation. It is the motto of the worldwide scouting movement ("be prepared"). Alexander Graham Bell, inventor of the telephone, knew it when he told a reporter "Before anything else, preparation is the key to success". Abraham Lincoln, US president back in the nineteenth century, knew it when he said "If I had eight hours to chop down a tree, I'd spend six sharpening my axe." And there are countless military men and top sportspeople who know it too. Failing to plan, as they say, is planning to fail.

So you won't be surprised to read that it pays to think ahead when facilitating learning in groups too. A useful way of structuring your preparation is to use the 7Ps framework below (adapted from Smith *et al,* 2015). Give yourself plenty of time to think about each of these as they will each have a bearing on your planning of the day. Don't be tempted to skip the last 'P' in the list as this 'risk assessment' can often be a great help to you in managing any anxiety that you might have about the event. Even better is when you can rope in a colleague to help you think through all seven of the factors below.

Figure 7: 7Ps of Preparation (Smith *et al*, 2015)

Each of these 7 Ps is described in more depth below.

1. PURPOSE – WHAT NEED IS THIS MEETING?

Put simply, if there is no need for learning, the chances of learning happening are slim. It is not enough for learning to be a great idea – it has to be relevant to those for whom it is intended. And this relevance has to be identified by the prospective learners, otherwise it just remains as your good idea (or the good idea of someone else who has perhaps commissioned you to facilitate learning). If people do not see the relevance, they are unlikely to show up, physically or metaphorically.

A good question to start with here is: "if this learning intervention works really well, what difference will it make to the participants and to those that they care for/provide service to?". If you are proposing to run your own 'custom' educational or learning event, the following additional questions are useful in helping to establish the need for any proposed learning intervention.

- What issues or problems are consistently mentioned within my team/service, and remain unresolved?
- What risks have been identified that require additional or new learning?
- Is this a 'learning issue'? In other words, is this problem being caused by some deficit in knowledge, skill or perspective/attitude?
- Where are the gaps in knowledge in day-to-day practice?
- What new ways of working or of practice have come to light in recent times?
- What areas of practice or of service are so central to our service that we could benefit from a refreshing our understanding of them?

It can also be useful to know if there is any relevant history that might impact on learners' ability to learn about this issue (for example, has it been tried before?). And, finally, it can be useful to start thinking at this point about how much time is required and available for learning to reach the required standard.

2. PRODUCT – WHAT IS THE INTENDED OUTPUT?

This is about making sure that you are really clear on what you expect people to do differently as a result of their participation and learning. Even if your learning intervention is a simple presentation, it is still legitimate to think about what difference the new knowledge is expected to make. For example, suppose you are facilitating a learning event on the subject of quality improvement and the session includes a presentation on a new approach to quality management from a renowned guru, followed by a question-and-answer session. In addition to the change of mind-set that would be anticipated as a result of this learning event, some of the changes or products that might be expected could include:

- Participants would go back to their teams/colleagues and share the knowledge with them
- Participants could identify one thing they could do differently as a result of what they have heard
- Participants could go back to their workplace and implement a specific new practice
- Participants could write a brief report on quality improvement, based on what they have heard, for general dissemination to other staff
- Participants could prepare a 'business case' for implementing quality improvement-related change in their workplace.

3. PARTICIPANTS – WHO IS THIS FOR?

Who do you envisage will be taking part in this learning event? This requires thinking about the general audience or target group for your intervention, as well as the specific group of participants that might be there on the day. Clearly, there is a link between PURPOSE and PARTICIPANTS in so far as your earlier thinking about need may have already brought you to thinking about a specific target group (for example, a need to improve the way care is provided to people with dementia in acute hospitals automatically suggests that the target group is acute hospital staff). Here are some additional thoughts about target groups and participants:

- Are you really clear about the **target group**? Are you putting any unnecessary boundaries around participation (restricting participation to one group when others might also benefit)? Are you satisfied that the need that you have identified earlier is relevant to the target group? Is the target group relatively homogenous (e.g. nurses working in ED) or it is much more disparate (e.g. acute hospital staff)? How will you get the attention of this target group so as to be able to publicise your event?
- What do you know about the **actual participants**? Can you know anything about them in advance? Is it necessary for you to set a ceiling on the numbers of people you can work with? Do you need to think about how they are to be selected/select themselves (for example, do you need to specify that participants need to have a certain level of pre-existing knowledge or expertise)? If staff, do they need to be at a certain grade or level (in order to ensure that they have the authority to implement change or to direct resources)? Do they require any help to prepare for the learning intervention? Are they clear about what is expected of them, both during the learning and after?

4. PROCESS – WHAT ARE THE REQUIRED STEPS?

Section 3.2 of this Manual will deal in much greater detail on what processes facilitators might use to ensure the intervention meets the needs of learners. At this point, before the actual event, it is about giving learners enough of a sense of process that they feel that they are in safe hands, that their learning is going to be structured and make sense.

One of the easiest ways of doing this is to construct a plan or agenda for the event and to distribute this in advance. The actual plan that you use will be much more detailed than the agenda that is sent in advance to participants – it is usually enough for participants that they see an outline agenda which gives just enough information about the process to enable the participants to ready themselves. The process should reflect things like breaks (it is not always necessary to give an exact time for them, simply to indicate roughly when they will happen, e.g. 'mid-morning') and should allow for enough time for facilitators/participants to introduce themselves.

5. PLACE – ENSURING THE VENUE IS APPROPRIATE

Ideally, the learning intervention should take place as close as possible to where participants work – in the practice setting, if possible. This reduces the amount of time people have to spend travelling to and from the venue. Learning that takes place in the normal practice setting can also be more readily applicable as everything else remains 'as is' (equipment, colleagues, clients, etc.).

If it is an off-the-job intervention, the room should, of course, be fit for purpose. This includes being large enough to comfortably accommodate all the participants and to carry out all the planned activities. If you're planning to break the group into smaller groups for any part of the learning, think about acoustics and whether the room can accommodate smaller groups working independently or whether you need break-out rooms too.

Ideally, the room will be light and airy, preferably with windows that can be opened onto the outside world, and with the facility to darken it to enable the showing of video clips, if relevant.

Use signs to direct participants to the room. If people are arriving at an unknown venue, it is amazing how quickly they can become lost! Make sure to arrange for food and refreshments for the group if needed. Have pens, paper and water available. Know where the toilets, restaurant and fire exits are.

If you are using a hotel or are a guest in someone else's venue or facility, it is important for you to have the name of someone you can contact before AND on the day in case you need to resolve some venue-related problem at short notice (e.g. the technology isn't working, or you can't use the internet because of local firewalls, or you can't figure out the air conditioning, etc.). Ideally, you will have checked everything out before people arrive, but it's good to have some sort of back-up if things go wrong with the venue during the day. It's a good idea to get there early (at least 30-45 minutes beforehand) to check everything is as expected.

6. PRACTICAL TOOLS AND EQUIPMENT

Think about the tools, equipment, props, models, and other materials you will need for your learning event. If you are not running the event in the normal practice setting, what will you need to bring with you?

Technology and equipment issues can be a major source of stress for facilitators. Take time in advance to confirm the compatibility of any electronic or computer-based equipment that you will be using with what is available at the venue. Alternatively, some venues insist that you use their equipment: if this is the case, make sure you have tried it out beforehand so that you are assured that your laptop, video clips, DVDs, etc. will work for you on the day.

There is no substitute for a dry-run, on site, to ensure that everything works as it is supposed to work. In general, you are looking to strike a balance between using established, tried-and-tested technologies with using new ones that look up-to-date and current.

In general terms too, simple is good. Complexity has a way of failing and having unknown consequences. Whatever technology you opt for should be robust and reliable. But even the most reliable of technologies can let you down, so have a back-up plan in the event of "systems failure". For example, if you forget to charge your laptop, what could you do? If you can't get access to Wi-Fi, what can you do? If you can't play that 'killer video clip' (your DVD refuses to play…), what can you fall back on? If the projector fails, what can you do? Of course, none of these disasters *should* happen, but best to 'be prepared' in case they do.

7. POSSIBLE ISSUES – CONTINGENCIES AND RISK ASSESSMENT

Having attended to the first six of these preparatory steps, it is hoped that there will be no failures or unanticipated problems. And, in the vast majority of cases, things will go smoothly. But it can be worthwhile thinking through some less obvious risks, for example:

- You get a puncture on the way to the venue
- There is a fire alarm at the venue
- Key people (e.g., subject matter experts) are prevented from getting there, for whatever reason
- Participants object to the content for whatever reason – it is not what they expected or they were sent at the last minute and had no way of knowing what to expect
- Time runs out – you don't get to cover all that you might have wished
- For some reason, you're in a different room to the one you were promised, and it is not suitable.

In many cases, there is not a lot that you will be able to do, on-the-spot in practical terms, to address these. Often, it is enough to have simply thought about them in advance and perhaps talked them through with a colleague so that you can avoid the 'rabbit in the headlamps' feeling of being caught by a glitch on the day. As a facilitator, you will have a lot to attend to on the day of your learning intervention and you really won't want to have to problem-solve in the moment. You will feel a lot more assured if you have given some thought in advance as to how you might handle an unexpected glitch or major catastrophe.

A CHECKLIST

This following is a useful checklist for running learning events/workshops.

PREPARING TO RUN A LEARNING EVENT / WORKSHOP

- If you have a clear idea about your target audience (e.g. all staff working in Ward 1 or in community services for older people), liaise with potential participants and/or with their managers about the best time to ensure release for the workshop and to identify a suitable date, time and venue. For example, find out if there are routine practices at particular times (drugs rounds, hygiene inspections, Tuesday management meetings, etc.) that make those times/days particularly awkward for people.

- Ensure the workshop times are as practical and convenient as possible. Liaise with stakeholders (e.g. participants, managers of participants, those who generate rosters, etc.) to ensure the date is viable.
- It is important that you consider your participants' possible needs and personal preferences. For example, you should ensure that everyone can see and hear what you are doing and saying, and that the room is accessible. You may also need to think about whether the activities and exercises you have chosen are appropriate to participants' age, gender and religious/cultural beliefs as well as to any physical and sensory impairments.

ADVERTISING THE EVENT/WORKSHOP

- Depending on staffing and rosters, think about the time that is needed in advance to ensure adequate notice of the event – this may be six or even eight weeks ahead.
- If you can, use social media or internal notice boards to publicise the event. A simple way of bringing it to people's attention is to adapt your email signature to mention the event for a few weeks in advance.
- Use eye-catching posters, copied and enlarged to A3 size (if possible) to ensure people know of the existence of the event, and to convey all the relevant details* (see Appendix 1.1 for a sample – poster templates are available through standard Microsoft Office applications such as Word, PowerPoint, etc.).

*A way of remembering the 'relevant details' is the 5Ws + 1H framework (why, what, when, where, who, how) including:

- Why the event is being offered (what outcome is expected).
- What is being offered (e.g. a half-day interactive workshop called "Xxxx Xxxxxx Xx Xxxxxx").
- When and where it will take place (including, perhaps, a mini-map if the venue is not well-known).
- Who it is for (target audience), as well as a name and contact details for people to find out more.
- How the workshop will be structured, in broad terms (gives people an idea of what to expect).

GENERAL REMINDERS

Check that you have:

- Copies of relevant handouts or worksheets for the participants and feedback forms
- A flipchart (or several flipcharts, if appropriate) and pens/markers which work/are legible
- Post-it notes, if necessary, and a watch or small clock so you easily keep track of time
- Laptop and AV projector for PowerPoint and DVD clips, speakers and a plug extension lead
- 'Blu-tack' or masking tape or some way of attaching flip chart sheets to walls for display, if relevant
- Refreshments/energy boosters (e.g. water, sweets) and a small bell (to refocus attention, if needed)
- Anything else you might think you will require for your intervention.

DOCUMENT TEMPLATES

In addition to preparing the venue and content, it is useful to have the following documents to hand. Templates for these documents are to found in the Appendices to this Manual.

- a sign-in or registration sheet for participants
- a feedback or evaluation form for participants to complete
- a certificate of attendance for each participant (with relevant accreditation details if appropriate).

3.2 – THE LEARNING SESSION ITSELF – FACILITATING LEARNING IN GROUPS

As has been said earlier in this Manual (Section 1), facilitating learning in groups is about trying to make it as easy as possible for group members to learn.

We have looked at some of the factors that affect individual learning in Section 2 of this Manual, factors such as people's preferred learning styles, multiple intelligences, and other factors such as motivation, emotion, prior knowledge and need. In this part of the Manual, we will look at groups and how to manage group dynamics so as to enable as much learning as possible, and we will also look at what general processes can help individuals learn in groups.

We will finish up by taking a look at how a facilitator might handle some 'challenging' participant behaviours, as it is often fear of these behaviours that makes for nervous facilitators!

UNDERSTANDING YOUR GROUP

One of the factors that will have a bearing on your success as a facilitator is the knowledge you have of the group ahead of the session. Some of the things you might want to think about / find out about in advance are:

- Is it an **existing group** (or a subset of a larger group), or is it going to be a collection of people who are simply gathered together for the common purpose of learning? If it is a group that is already in existence (for example, a service delivery team or all staff from a service area) or a subset of staff (e.g. all nursing staff from the medical wards), you will need to give careful consideration to the relationships they have to each other. Think of the formal reporting / accountability relationships as well as the informal ones, such as friendships, history together, power relations, etc.
- Who are the **opinion leaders and key stakeholders** within the group, and will they be present?
- Is the workshop a **one-off event**, or is it the first in a series of events involving this group?
- How **engaged** are people likely to be when they arrive on the day (this can often be a function of how involved they have been in identifying the need and in agreeing that this learning session is the way to address it!)? How interactive should the session be in order to facilitate their learning?

If the group consists of a collection of people whose only relationship to each other is that they all happen to be together for the session you are facilitating, this can make life for you easier in some respects, and harder in others. In simple terms, it can make things easier in the sense that you don't have to think too much about or try to factor in any 'baggage' between people arising from previous tensions – in effect, you are starting with a clean slate. However, as the people do not know each other, you will have to spend more time at the beginning helping them to become comfortable in a group of strangers, and they may be less willing throughout the day to take risks or try out new things.

If the group is a pre-existing group, it can be useful for you to know a little about their prior history together as a group. This is because groups tend to have a relatively predictable **life-cycle in their development** – facilitating learning in a newly-established group can be very different to facilitating learning in a group that has been together for a long time.

FACILITATING LEARNING IN GROUPS

Groups usually go through a series of stages, or a life-cycle, on their way to becoming truly effective. They start out being quite polite and formal with each other (known as the 'FORMING' stage – see Figure 8 below) until they get to know each other a bit. They then often move on to a more testing time in their life together where they feel safe enough to voice disagreement or to challenge the status quo (the 'STORMING' stage). Once these challenges have been weathered, they then move to a time where people become tired of tension and want solidarity, and this often marks the 'NORMING' phase.

But this norming can feel artificial and a bit stultifying for groups - groups where there is no conflict can often signify too much compliance and conformity, otherwise known as "groupthink" (Janus, 1972). People will usually want to loosen up a little and find a way of being able to work together but be different. This is when the group can be said to be most effective, when it is truly 'PERFORMING'. This is marked by an ability to balance sensitivity to difference, along with robustness and even healthy conflict.

And, finally, no group is together permanently: there will come a time when they have to 'ADJOURN' or even 'MOURN' their passing.

Figure 8: Stages of Group Development (adapted from Tuckman and Jenson, 1977)

This is not always a simple straight-line process. Groups can be set back in their development by a number of different things, such as new people joining. Your arrival as a facilitator for the day may even cause the group to 'regress' a bit: for example, group members might go back to being more polite and formal with each other (forming) or, because you are there, they may feel it safe to express disagreements or ask questions that they have not felt safe to mention before (storming).

The **size of the group** can make a difference too. The larger the group, in general, the more difficult it can be to make things interactive, especially if you are facilitating alone. Group movement can take longer (for example, when people are moving to and from breakout rooms or breaks) and you will need to factor this in to your timing. You need to ensure that everyone can see and hear you clearly, so you may need to think about audio-visual supports. And, of course, the more people there are, the less time you will have to pay attention to their individual needs as you will have to spend more time attending to the group as a whole.

Group composition is another important factor, whether this is an existing group or a group that is simply coming together on the day for the purpose of learning. It can be useful to find out as much as you can in advance about the diversity of the group (in terms of disciplines, sites, ages, etc.) and in terms of the seniority of the different group members. The greater the diversity, the more opportunity there will be for learning, but it may take longer to 'get everybody onto the same page' and to ensure that everyone is using language to mean the same things. The greater the power difference between people in the room, the more you may have to contend with some people feeling they have the 'right' to be heard first or more than others, and/or some people feeling reticent about voicing opinions in front of others who might have more seniority.

Of course, power is not simply about grade – power can also be unevenly distributed between (or attributed to) people because of their gender, discipline, role, relationships and even personality! If power imbalances are getting in the way of learning, there are things you can do to minimise this effect – these are described below in the section on group work processes.

If the meeting is **a one-off**, and this group of people will not be working together in the future, in general, you can afford to spend less time on investing in relationship-building. You need just enough investment to enable people to feel relatively safe with each other – this often amounts to ensuring people know each other's name, where they work, and perhaps a bit about their reason for being there on the day.

If this is the **first in an ongoing series of sessions** where this group will work together, it is worth spending a good bit more time at the outset to enable people to start building relationships with each other. You may even need to start with 'unbuilding' assumptions or biases in order to facilitate this – for example, if the group consisted of a range of disciplines in healthcare, it might be useful to factor in some time at the first meeting to acknowledge that people are starting with different perspectives and giving them time to get to know a little about what is behind the 'professional mask' or stereotype.

And finally, there is the issue of **engagement and interactivity**. We spoke in the earlier chapter about how issues such as motivation, choice and focus can make a real difference to the level of engagement of people when they are participating in learning events. The simple factor of people self-selecting for learning, as opposed to being 'conscripted', can make a really significant difference. If people are allowed to sense the problem (need for learning) themselves, they are much more likely to arrive engaged. If there has been a demoralising history of 'we tried this before and nothing much changed…', this will need to be acknowledged and people will need to be given a chance to see why it is different this time. Otherwise, you may be dealing with unspoken resistance from the outset.

Regarding the degree of interactivity that is appropriate, in addition to group size, there are a number of factors to be taken into account. A useful way to think about the issue of interactivity is to use the diagram on the right to gauge your group.

Rate your group, as best you can, on each of the five factors by scoring them on the 1 – 5 scale. Then look at the overall pattern of scoring. Essentially, the higher the scores, the more likely you are to need to inject some interactivity into the session rather than assuming it will take place naturally or unaided. Of course, some learning sessions may not require much interactivity: for example, it will be appropriate in some circumstances to give a PowerPoint presentation to large staff groups. Such presentations tend to be one-way, i.e. largely comprised of communication from the speaker to the audience with little feedback or interaction.

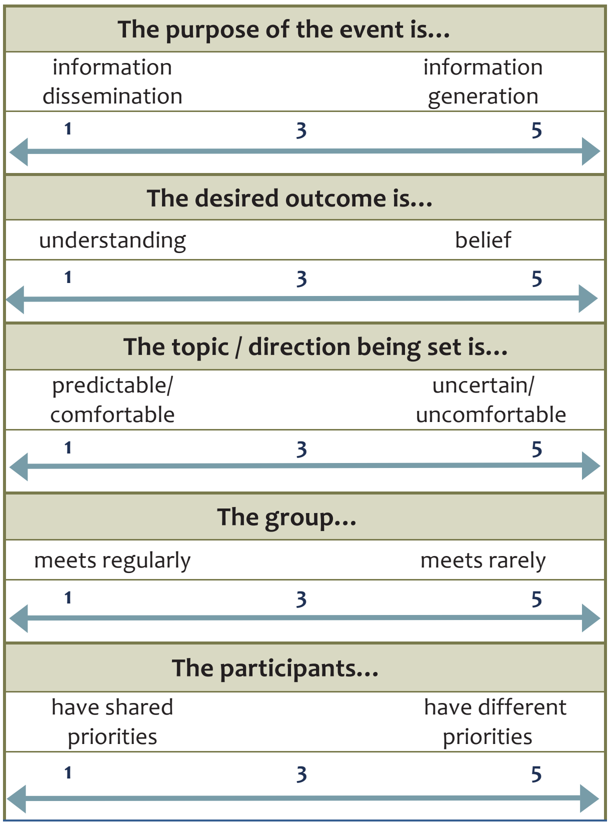


Figure 9: Judging Interactivity (NHS Institute for Improvement & Innovation, 2009)

SOME COMMON PROCESSES FOR WORKING WITH GROUPS

Anyone who has ever participated in a workshop, engaged in continuing development or worked in large organisations has probably taken part in group sessions in which they experienced a variety of ways of working, such as listening to plenary presentations, brainstorming in small groups, reflecting on problems in break-out sessions, working in pairs or trios to practice new ways of doing things, etc. Degrees of comfort and preference for these different ways of working can vary, with some people enjoying working in groups whereas others prefering to work on their own.

As a facilitator, you will be using a variety of processes to help people to feel comfortable working with each other, to help them learn in different ways and suit their own styles and preferences, and to ensure a good balance of energy throughout the session. A general rule of thumb is to aim for a varied session (e.g. a mix of PowerPoint, large group work, small group work, etc.) to keep the group's interest and attention.

Below are some suggestions for different processes you might use when working with groups.

INTRODUCTIONS AND ICEBREAKERS

The beginning of the session is a really important time, whether this is a group of people who are new to each other or whether they are reconvening from a previous session. How you open the session can set the tone for the rest of the day. This is a great opportunity to put people at ease – remember, they may be quite anxious if they are coming to a new group or place for a process that is not really known to them.

One of the most important things you can do is to greet people well. Make a quick connection with them as they arrive and welcome them to the room/venue. Make good eye contact with them and, of course, smile at them too. If you can, stand at the top or even in the middle of the room – this gives people a sense that you are confident and assured. This will help them feel safe too. People remember what we do more than what we say, so using body language to communicate *your* comfort at this time is critical.

It is really important that you grab the attention of your participants at the outset and establish your credibility as a facilitator right from the start. This is not just about showing them 'who's in control here' but is about making the session feel properly and confidently contained. A useful mnemonic for the opening of your session is INTRO:

- **I**nterest: Grab people's attention through telling them something about yourself. If you can, make this fresh and local so that it sparks their interest.
- **N**ame: tell them who you are and what to call you. For those who are visual learners, it can be useful to have your name pre-written on a flipchart. This may be the point where you establish your credibility too, by claiming your expertise or your experience.
- **T**iming: let people know what the timetable of the session is – and particularly, tell them when you'll finish, if/when you'll take a break, etc. Even if you can't be precise about the time you'll take a break, let people know that it will be, for example, 'mid-morning'.
- **R**ange: give people an idea of what will be covered in the session (headlines are usually enough, especially if people have already received a programme or agenda).
- **O**utputs: give people a sense of what they can expect to take away from the session, what they'll have learned, whether they will have practical tips to put into effect, whether there will be a chance to work on their own action plan, etc.

This mnemonic is just to help you to remember the five elements but feel free to share the five pieces of information in any order.

Sometimes, there is a need for a facilitator to develop a deeper level of trust with a group, a level of trust that will make it easier for them to engage with a sensitive problem or a risky change, or to disclose something that may be difficult to talk about. In this instance, Hogan (2003) offers another acronym that can help you to think about trust-building. This acronym is COKE and the letters stand for Commitment, Openness, Knowledge and Empathy. Clearly, trust building will depend on how you are as well as what you say but the explanations below may give you some ideas of how you can let people know about your Commitment, Openness, Knowledge and Empathy.

C COMMITMENT	Demonstrate or tell participants that you are committed to the subject area (e.g. 'improving person-centred care'), to facilitation (e.g. "I really like working with groups of people like you to help them explore this subject"), and to the participants themselves (e.g. "I'm looking forward to hearing how things are for you in your services and what it might be like for you to try to bring in change").
O OPENNESS	Show participants that you are open and approachable by just letting them know (perhaps when you're talking about ground-rules) that they are free to ask questions at any stage, even 'dumb' questions, and that they can raise issues with you at any stage in the room or even at coffee break if it's something they want to talk about in private.
K KNOWLEDGE	We trust people more when they know what they are doing. So, let people know that you have been, for example, working in healthcare for X years, facilitating groups for X time, working with this service or type of issue for X years, etc. There are mixed views about whether we should tell people if we are new to facilitation: on the one hand, letting them know we are new may help to reduce their expectations of us but, on the other, they will possibly feel less assured, less safe. So it may be best to let people know about the relevant knowledge you ***do*** have rather than highlight areas where you might be weak.
E EMPATHY	This is possibly the most important of the four and is about building rapport, connecting with people, being able to put yourself in their shoes. So, for example, you might find something that you have in common with participants, such as reflecting back to a time when you walked into a workshop and weren't sure of what it was about, or who might be there, or a time when you got lost driving to a venue, etc. Or you might raise awareness of your common background if you all work in healthcare. Or you might let them know that you're originally from Kerry or trained in Dublin, etc. if this seems relevant to participants. In smaller countries like Ireland, people tend quite naturally to look for links between themselves, so help people to do this by offering them small pieces of information about you that will help them link to you.

Some facilitators like to use ice-breakers to help people to get to know each other and feel more comfortable being there. However, they are not everybody's cup of tea and so they should be used with care. If you are using an ice-breaker in your session, consider the objective of doing so and make sure you communicate this with the group. Be careful that the ice-breaker doesn't back-fire, i.e. make people feel more uncomfortable or too self-conscious. When deciding whether to use an ice-breaker in your workshop, think carefully about:

- Who will be there? Some professional groups dislike ice-breakers more than others. Senior managers may be less willing than others to do something that might make them look foolish in front of younger staff or people from outside the organisation.
- How long have you got? If the session is short, you may need to spend more time on the issue itself

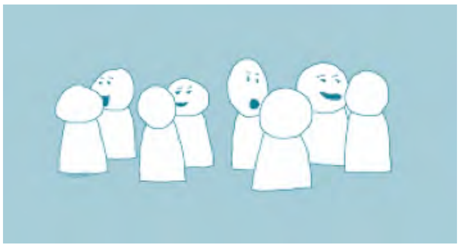
- Do you want this group to develop relationships and break down barriers? Ice-breakers are usually used to get the group mixing, talking and finding things out about each other.

If you do decide to use an ice-breaker, some simple and relatively quick ones include:

PAIRED 'INTERVIEWS'

Ask each person to find a partner. Note that, for some people, having to 'pick' a partner from a group of strangers is daunting, and they would much prefer to be told who their partner is. So, for simplicity sake, it's often easier to say something like "turn to the person on your right – this is your partner for this exercise"). Then tell the pairs to interview each other about one or more of the following sample topics (or whatever other topics you choose), depending on how much time is available.

- One unusual thing that has happened in their lives
- Special talents or hobbies they have
- Their two most important responsibilities at work
- The person they most admire in the world
- A colour and an animal that they feel best describe who they are and how they feel.



PAIRED INTRODUCTIONS

This exercise serves two purposes: it helps break the ice between people and it ensures that everyone knows who is in the room. Ask each person to find a partner (see above). Then ask the pairs to introduce themselves to each other as they think their best friend would – their likes, dislikes, hobbies and interests, personal aspirations and so on (e.g. "this is Anne. She's from Kerry but has been living here now for ten years. She trained in Cork. She loves rugby and is an avid reader too. The best book she read this year was 'Brooklyn' and she's going to New York later this year and hopes to make it as far as Brooklyn while she's there. She doesn't like cats. She'd love to work in Quality Improvement").

SOMETHING NEW

You need to know who is in the group, and it's always great to get people to start speaking and interacting sooner rather than later in a session. But it can be hard to get a group to see that it is worthwhile spending time on introductions when they already know each other. So, for a pre-existing group, a really good ice-breaker is to ask people to describe something about themselves that nobody else in the group is likely to know. It is always really interesting to hear what people say and people generally seem to like hearing more about their colleagues and telling their own stories. This always gets people a little excited because they don't know what to reveal! You can make it a little less daunting if you let people know that they can disclose something relatively harmless, like the best film they've seen this year, or who their teenage pop idols were, or their favourite colour. An interesting variation is to ask people to say what career they would like "in their next life".

LIAR, LIAR

If the group is really well-used to working together and believe that there's almost nothing they don't know about each other, another good exercise is to ask each person to write down two truths and a lie about themselves. Individuals then tell the three 'facts' about themselves and the group has to determine which one is the lie. You may need to put a time limit on each person (say, three minutes).

As the group members are introducing themselves, remember to keep a note of who is who (you can quickly write names down on a pad without losing too much contact with people or, if it's a small group, you can capture the names on a 'map of the group' on a flipchart). It is great if you can remember people's names – this usually makes people feel very assured. During idle moments, you can test yourself and the names in your mind. Of course, you can always give people name badges if you're really worried about this aspect of things.

GETTING STARTED

SETTING GROUND RULES AND EXPECTATIONS

It is useful to set **some ground rules** at or around the start of the workshop. These ground-rules can help to set the tone and 'educate' participants as to what behaviour is expected. Even if your group of participants is well-used to attending workshops or group sessions, it is worth setting the ground rules because it enables you to hold the group to account for their behaviour during the session. It also protects both individual participants and you as the facilitator (there may be sensitive stuff coming out during the day) in relation to expectations.

You can offer a set of proposed ground-rules to your participants or, even better, you can invite them to name their own suggestions for things that have, in their experience, contributed to the effective running of meetings/training sessions. If they have had very little such experience or offer no suggestions, you can then offer your list/set of ground rules.

There is no such thing as a standard set of ground-rules, but they typically cover a mix of 'housekeeping' issues (no mobile phones, start / end on time, people are free to help themselves to water throughout, etc.) as well as rules which are designed to make working and learning in groups easier/more enjoyable, such as:

- *Only one person speaks at a time*
- *Confidentiality - what goes on in here stays in here (unless otherwise agreed)*
- *Everybody's voice is welcome*
- *It's OK to have a different perspective*
- *A balance of contribution is ideal, etc.*

It is also useful to **give people an idea of your expectations** for the session at the beginning of the session. This should include the purpose of the session, what you expect from them as active participants and what they can expect from you as the facilitator. This ground-rule and expectation-setting does not have to be a lengthy piece but it should be done with good attention so that people know that it is something that you take seriously.

A good way of getting people to **think about their own expectations** and to tune into their own needs (that is, what brings them to this learning event) is to invite them to consider three questions (see text box alongside), questions which are firmly grounded in the competency approach to training. These three questions are based on the idea that competency is a blend of knowing (knowledge), being able to do (skill) and feeling or seeing things in a particular way (attitude). This ties in to Purpose, the first of the 7Ps mentioned above. It can also make evaluation of the event easier (see Section 3.3 above).

> *At the end of this workshop:*
>
> 1. *I'd like to be able to do...?*
>
> ___________________________
>
> 2. *I'd like to know more about...?*
>
> ___________________________
>
> 3. *I'd like to feel...?*
>
> ___________________________

FACILITATING LEARNING IN GROUPS

DISCUSSING HOPES AND FEARS

This is a good way of giving people an opportunity to identify, for themselves and for you, their hopes and fears for the session. Start by simply asking each member of the group to think about what their hopes are for the subject you are discussing, and to write it down in their own notebook. Then ask people to share some of their hopes and you can write them down on a flipchart. When each person has named their hope for the session, you cluster the hopes to form groups of similar hopes. Each hope is discussed so as to ensure that it is understood. If there are hopes or expectations that are not possible to achieve, this is a good time to (gently) start letting people know that some things are outside the scope of the session.

The same process is then followed for fears. It can be useful to 'boundary' this with a reminder to people that you are talking here about fears they might have about what happens during the session or in relation to the learning. You may want to discuss the fears, again to ensure that you understand them and to deal with any of them that might be 'easy' to deal with (for example, if someone is really worried about being forced to role-play, you could let them know that they will have some choice in the matter).

It can be useful to display the flipchart lists of hopes and fears throughout the session so that you can refer to and/or address any that are emerging during the course of the group work.

If people do not know each other prior to the session, they may feel a little shy about sharing hopes and concerns with strangers at the start. You can make this easier by splitting them into much smaller groups and inviting them to discuss their hopes and concerns amongst themselves before sharing with the larger group.

WORKING IN DIFFERENT WAYS/WITH DIFFERENT SIZES OF GROUPS

Most facilitators take the opportunity to work in different ways with groups in the course of a session. Even if you are running a short session, there will be opportunities to work in different ways. Working in different ways is important in terms of energy management and in terms of giving people opportunities to learn in the way that most suits their learning style preference.

> **Small groups give everyone a break from the large group and help to generate discussion and stimulate participation.**
>
> *Prendiville (2004)*

SPLITTING UP INTO SMALLER GROUPS

One of the most common ways in which to give people an opportunity to work more interactively is to split the large group into smaller groups for the purpose of discussion or some other activity. Small groups are an efficient way of helping to generate discussion and stimulate participation. Small group discussion simply involves a small number of people (usually, less than 6) examining an issue and sharing thoughts and ideas about it. If you want the group to give feedback after its discussion, you will need to let them know this in advance and let them know that they will need to identify a reporter. As the facilitator, it is not usual that you would join one of the groups, but you can sit in (without participating in the discussion) with all of the groups for brief periods of time. If you need to re-orient a small group - for example, to remind them of the time, or if they seem to be getting seriously sidetracked - you can gently offer these observations. You may also need to remind people that the ground-rules apply in these small group discussions too (for example, ground-rules about listening or respecting each other).

It is useful to think ahead how to split a larger group of people into smaller groups. This is particularly the case when you have a group of people who already know each other or who share something quite distinctive (for example, a discipline or location).

FACILITATING LEARNING IN GROUPS

There are different ways of dividing the group and you can choose from one of the following approaches:

- Invite people to work with the person beside them (**pair**) or to form small groups of three with their neighbours (**trios**). These very small groups work well when people are still getting to know each other or when you want quick 'buzz discussions' (e.g. "work with the person on your right, for five minutes, to generate as many 'top tips' as you can on this subject").
- Simply announce to the group that you would like them to break into discussion groups of four people per group (you can alter this number depending on the number of people in your session). It is up to **participants to sort themselves into groups** (which usually happens relatively easily, though there may be one or two uneven groups left). When they have sorted themselves in their groups, give them a discussion topic or task assignment. Remember to tell them the time they have to complete the task.
- If you want **a transparently random allocation** of people into small groups, use the 'count off' method to split your participants. This is easily done but you need to be careful to first **clarify how many small groups you want**. (Do this by dividing the total number of people in the room by the size of the small group you want – for example, if you have 20 people in the room, and you want them in groups of four, you will have five groups). Then ask people to count around, from one to X (five in this example). Then ask all the **1**s to form a group, all the **2**s to form a group, the **3**s, **4**s and **5**s.
- Another way in which you can have **transparent random allocation** of people into smaller groups is to have a set of numbered ping-pong balls (with the desired number of 1s, 2s, 3s etc. written on them). Pick a random ball from the bag or box, and throw a ball to each person. Then ask people to find others with the same number in order to form discussion groups.
- You can allocate people by **some known criterion**, such as where they're from, their discipline or grade, etc. This has the effect of ensuring all grades or areas are heard, but it can also have the effect of concentrating the differences between disciplines, locations, etc.
- If you have the participant list in advance, you can pre-assign people to groups by giving them a number, a letter, a colour or a shape, written on their name badge. Then, when you want to break them into smaller groups, simply ask people to join together with others who have the same number/letter/colour/shape, etc. You can make things a bit easier too if you assign different areas to different groups ("the blue group will work in this corner, the red group at that table" and so on – telling people where to find their group 'home' can prevent a lot of people wandering around trying to find their colleagues and locate themselves in the right place!). If you pre-assign people to groups, you should let people know the basis for the assignation – was it random allocation or was it based on some other criterion? If you don't tell people, you run the risk of them imagining some rationale, which may or may not be right.

WORKING IN DIFFERENT WAYS

The table below summarises some of the main ways of working with groups, including splitting into smaller groups, when facilitating learning. This is not an exhaustive list – it would be virtually impossible to summarise all of the approaches in a manual like this. Each of the approaches is annotated in terms of its advantages (the tick marks ✓) and in terms of the things to watch out for (the exclamation marks !).

WORKING IN PAIRS

- ✓ Especially good at the beginning of a group's life together.
- ✓ Good for in-depth or personal exploration of an issue.
- ✓ Good for shyer participants.
- ✓ Good for quick 'buzzing' on a topic.

- ! Make sure people aren't working with the same partner all the time as working in pairs can feel quite intense. Give people the opportunity to work with someone they don't know.

SMALL GROUPS

- ✓ Good for re-energising people when the large group seems to be flagging.
- ✓ Good for giving the more shy or quiet people an opportunity to contribute.
- ✓ Good for minimizing the effect of a dominant individual (limits their impact to a small group).
- ✓ Good for getting simultaneous discussion by a much greater number of people.

- ! Can get tiresome if over-used (people can feel like they're not 'settling').
- ! The rationale for allocation or splitting needs to be clear and accepted, otherwise it can leave people with some distrust.
- ! The group must be given a very clear and unambiguous task or topic for discussion – it's not enough to say "just get together and have a chat about this for a few minutes…".

BRAINSTORMING

- ✓ Great for encouraging spontaneity, for generating ideas and thoughts on a problem or issue.
- ✓ Usually leads to a lot more ideas than would be offered in a large group situation.
- ✓ Good for getting people buzzing about an issue, so especially good at the issue exploration stage.

- ! People need guidance on how to do it – they need to understand that it is about ***quantity*** of ideas before quality, and that criticism and/or self-censorship are not conducive to brainstorming. (The quality of the ideas and suggestions can be judged later.)

LARGE GROUP DISCUSSIONS/PLENARY SESSIONS

- ✓ Useful for holding general discussions, for airing different perspectives, for giving or presenting information, seeking proposals, and getting agreement on things. Also good for building trust and for exploring common issues – can work to encourage people to participate as they hear others talk about their experiences of an issue.
- ✓ A good way to enable small groups to present their work back to the whole group.

- ! Maximum participation will need to be explicitly encouraged and everyone must have an opportunity to contribute.
- ! Can be dominated by one person.
- ! Attention spans are often short when large groups work in this format.

TEAM-BUILDING EXERCISES

- ✓ Useful for a team when it wants to experience working together – usually on an issue of no real importance to its day-to-day operations.

  (for example, the team is asked to name five famous people, then told that there is a meteorite heading for earth. A spaceship that can get people to safety is departing from the airport but there are just two spaces left on it. The team has to discuss and reach agreement on which of the five named people should be given one of the two seats).
- ✓ Good for getting a bit of energy and fun flowing.

- ! For these exercises to be seen as useful, there needs to be good observation and feedback to the team members about what happened and how people behaved. Giving this type of feedback is a skill in itself.
- ! The exercise needs to be well set up and well debriefed if it is to (i) work well and (ii) be seen as a useful use of the group's time together.

FISH-BOWLS

- ✓ (i) The group is split in two and one half sits in a circle. The other half sits in a looser circle surrounding the first circle. The outer circle observes the inner circle at work and then gives feedback.

  Good for listening, for observation and for reflection.
- ✓ (ii) If the seats are placed so that the people on the inside circle are looking at the people in the outside circle, it can serve as a kind of 'speed-dating' exercise where there can be rapid (timed) discussion between pairs of people facing each other. After the agreed time, the 'inner circle' people move to the next seat and start the discussion with whoever they line up on the outer circle (the outer circle people don't move).
- ✓ At the end, individuals can be asked to summarise, for example, three things they learned about that topic/issue and three things they learned about themselves in that exercise. They can share as much as they feel comfortable sharing in the large group afterwards.

- ! If this is the first time the group is participating in such an exercise, you need to give careful instruction and agree the criteria for feedback.
- ! Can feel daunting for those in the inner circle being observed.
- ! (ii) Again, needs careful set-up and clear instructions. If there is a large number of paired discussions, it can be intense and exhausting for participants. It can often take quite a lot of time.

SIMULATION EXERCISES

- ✓ People complete a task that simulates what would/ might happen 'in the real world' – gives them an opportunity to try it in a low-risk setting and to learn by doing.

- ! The exercise needs to be properly set up so that it is a credible simulation of actually happens in the real world.
- ! Good feedback is needed to facilitate the learning from experience (for example, using the adult learning sequence described in Section 2).

CASE STUDIES

- ✓ A historic real-life problem is shared with the group and they are given an opportunity to consider how they might have addressed the problem. A great way of getting people to apply learning to a real situation.
- ✓ Can be done in large group or small group formats.

- ! The case study needs to be real enough and detailed enough to be credible and yet 'anonymised' to ensure confidentiality.

ROLE-PLAYS *see Appendix 2 for a more detailed guide on setting up and managing role-plays*

- ✓ People act out a situation, either given to them in a case-study format or generated from their own experience of problems they have faced or currently face. Like simulations and case-studies, a great way of giving people a chance to try out new approaches in a low-risk setting. Particularly good for skills training/skills practice.
- ✓ Role-plays can be done in the large group setting first and then, time permitting, in simultaneous trios (two actors and one observer, and then the roles rotate amongst the three people so that they each get a chance to play the two parts and to observe).

- ! Need to be carefully managed so that they 'actors' are clear about what they are doing (and are given an explicit chance to 'de-role' when it is over). It can feel daunting to the actors, and it can be made a little easier by asking the group to generate a list of 'top tips' to help the 'lead actor' remember all that they are about to try to put into practice.
- ! Feedback needs to be carefully managed as the role-play actors can feel quite vulnerable afterwards.

'PARKING' ISSUES	
✓ Literally, keeping a list of issues that are 'parked' for later discussion. Such lists are great for managing premature relevant questions ("I'll park this for now because we're going to cover it later") and for dealing with questions or comments which are not relevant ("I can see that this is an issue for you but I think it's probably outside the scope of what we're going to be able to cover or deal with today"). Sometimes, they are used where issues arise and the facilitator is not sure of their relevance at that moment ("I'm not sure whether this will fit in with what we're going to cover so I'll put it on the list and we can check back on it…")	! You need to refer back to the list of parked items, and address them or remind people of why they have not been addressed. Otherwise, people will see it as 'just kicking things into touch'.
USING VISUAL PROPS/TOOLS	
✓ Great for those whose learning style is strongly visual but also very good for giving information, for showing films, for keeping things on track (e.g. the facilitator follows a pre-set slide presentation).	! Can present difficulties if the group has linguistic or literacy problems. ! Can be a challenge for facilitators as these tools often require reliance on local technology or equipment provision (such as flipcharts, etc.)

SOME GENERAL POINTS ABOUT WORKING IN SMALLER GROUPS

Sometimes, for whatever reason, people can be slow to move into small groups. If it is the first time you have asked them to work in small groups, it may be appropriate just to give people a little time to do so. However, if you have trouble getting participants to start their work, say something directive to them, such as "folks, this is the interactive bit!". This usually raises a smile and a bit of laughter and helps people to start filling the void.

It is really important, when asking the group to engage in an activity or exercise, that you use the right exercise to get the desired outcome – general discussions usually don't get the required clarity and outputs. Give groups something specific to address so that you reduce the chances of people re-interpreting the issue. You can make things even clearer by writing the instructions for the small group work – on a flipchart, or on a PowerPoint slide which explains the activity/exercise to your participants (for example, "in small groups, work for 20 minutes on identifying the big service challenges you see in the coming three years. Make a one-page flipchart list of your group's answers and identify someone who will talk through this list in the larger group").

This can be particularly useful with larger groups where there is potential for confusion, for people not hearing or remembering what you've said, etc. If the large group is about to move into separate breakout rooms, it can be good to have pre-prepared hand-outs of the instructions that people can bring with them to keep them on track. Keep the explanation as brief as possible. Make sure you communicate the arrangements and expectations clearly (e.g., time available, expected output, topic to be discussed, etc.)

DEALING WITH CHALLENGING BEHAVIOUR OR EVENTS

Inevitably, your group will contain a mix of people with a mix of needs and backgrounds, a variety of ways of expressing themselves, and a myriad of ideas and emotions. There will come a time when you are challenged by something that one or more of the participants do. How you respond to this challenge is core to your success and confidence as a facilitator.

Below is a table with some of the 'classic' challenges that facilitators can face, along with an idea of what *not* to do, and some suggestions as to how to make an effective response. Please note that these suggestions can not be taken as blanket panaceas – it is up to you to decide whether you think they might be appropriate with your group in whatever context you are working.

Challenge	Try to Avoid	Suggested Ways of Dealing with It
ONE PERSON DOMINATES	Experienced facilitators would avoid trying to exert direct control over this person, except as a last resort. To try to control this type of behaviour is to run the risk of the person becoming even louder or objecting to your control. In addition, you do not want to humiliate the person as no-one learns well when they are publicly embarrassed.	When one person is dominating or over-talking, others are under-participating. Appeal to the silent majority by inviting them to comment or contribute ('that's one perspective… anyone got any others?"). If there is nothing forthcoming from them, you may have to let the dominant person know that you've heard them but that you need to move things on in order to keep to time. You can also take it as an opportunity to check in with people and to gently remind them of the ground-rules, assuming the group has set some rules regarding participation… "so how are we doing? Everything OK for you? Are we upholding our ground-rules? "(see discussion of ground rules on page 24 above). If someone is becoming dominant because they are long-winded and waffling, ask them to be concrete and specific ("can you give us an example of that?" or even "what is your main concern here?" or "I'm getting a little lost as to what the issue is here… can you help me by being more specific about this?"). If someone is especially vocal, you can have a quiet check-in with them at the next break. This needs to be done discreetly and respectfully, of course. You can do this *indirectly* (for example, "I'm noticing that you have a lot to say on these issues but that others aren't really saying much at all, so I can't help but wonder if these are issues that are relevant to you more than others and, if so, if this is the best place for you to try to raise them or have them addressed…?"). A more *direct* approach might be necessary in a very small number of cases ("Pat, I didn't want to ask this in front of the group, but I'm wondering if you're aware that you're doing a lot of the talking and others are saying very little… could you give me a chance to try to work more with others to get more of a balance in the level of participation?").
GENERAL LOW PARTICIPATION	Don't ignore this or assume that people are happy. And don't try to compensate for their low level of energy by trying to 'up' your own level of energy or input. You cannot energise a group, you can simply facilitate them to do it for themselves.	A low general level of participation is often a sign that there is something going on within the group or for the group. Check with the group ("I'm feeling that the energy is a bit low here / now… is this just me? Do you want to do anything about this?"). If it is a simple issue of just a dip in energy, the group will usually self-correct this when given an opportunity to stretch, get a glass of water, etc. If you sense that the low level of participation is due to people not feeling comfortable, you can also switch from large-group open discussion to a different format, such as small group work or paired work (both of these should lower any anxiety that might be inhibiting people's contribution).

LOW PARTICIPATION/ DISENGAGEMENT BY A FEW	It can happen that some issues are more important to some people than others.	If a small number of people are not that engaged because the issue seems not so relevant to them, check in with the larger group to ensure that they are happy that time is spent on this issue, that it is important enough to warrant attention here. Acknowledge that it may not be that important to some people and ask them to give the others time, space and support to address it/deal with it. If there is a low level of engagement which seems to be caused by simple shyness, you can make it easier on the shyer participants to share thoughts or make suggestions or just give their ideas by asking people to write their thoughts down on post-it notes and then inviting people to put their post-its on a wall.
TWO PEOPLE 'LOCKING HORNS'	Don't give the two people endless time to engage in a ding-dong battle of wills or ideas. If the two people already work together, you may be dealing with 'baggage' that hasn't been resolved to date and is unlikely to be resolved here.	Sometimes, the to-and-fro of a robust discussion can help people clarify their thoughts. You can comment on this and reach out to other people in the group by asking, "There are some interesting ideas coming up here… Who else has an opinion on this issue?" If the issue is not that relevant, you may have to intervene by suggesting that it is "parked" (see previous table) and the two individuals can take it up themselves over lunch, perhaps, or the group can return to it later in the day, time permitting. If you feel like you're getting into the territory of having two dominating participants, the suggestions above regarding one dominant person may also be useful.
A LOT OF WHINGING AND GENERAL NEGATIVITY	Sometimes, a culture can grow in a group whereby group members feel that it is good to show how much they can moan about something or criticise it. Don't let this kind of behaviour dominate the session.	If you're sensing a lot of moaning and negativity, make a (non-judgemental) comment about this – simply reflecting it back to the group ("wow, things seem quite bad for you here, simply on the evidence of your comments"). This can be enough to stop the negativity. But sometimes you may need to add something like ("would it be good to turn to how you could do something about the way things are here, or how you cope better with the way things are?"). If the moan or complaint is very general ("communication is so bad here"), acknowledge it but ask for an example and see if the group want to address this as an issue. If you are in a good place with the group (they trust you), you can really challenge them with something like "let me be devil's advocate here… it's beginning to sound like you'd prefer to 'curse the dark rather than turn on a light'… or am I hearing things wrongly…?". This can engender a lot of debate about culture, power, etc. (which might be very useful) so it needs to be handled very carefully.
NOT STARTING OR ENDING ON TIME	Whilst you may need to allow for a little 'wriggle room' at the start, you cannot wait too long. Waiting for a few latecomers can give the impression to those who are present that the power lies with those who have not yet arrived.	Be clear about the start time for the work (some people interpret the start time as the time they need to get a coffee!). Honour those who are there by starting when you say you're going to start. This applies to resuming after breaks too. If you feel the session is going to overrun, let people know this as soon as possible and ask them if they are happy to stay (perhaps give people a few minutes to 'phone home' or make whatever arrangements they need to make to enable them to stay on). If they are not happy to stay, you must decide what you will not cover – you can ask the group to guide you in this decision or you can judge yourself what can be cut. If running over becomes a recurrent theme for you, take another look at your time planning.

SILENT PARTICIPANTS	It may be tempting to 'shine a light' on these participants and directly invite them to contribute. However, this can have the effect of making shy people even more self-conscious and reluctant to speak.	You can check with the group generally ("did I get to hear everyone who wanted to speak?" or "maybe we can get the opinions of those who haven't talked for a while."). This can 'make a space' for people to speak up. But it may not work for everyone. One of the best ways of encouraging participation by all is breaking into small groups, as small groups allow shy people to talk without feeling too exposed. This is particularly useful if there is a mix of grades/ seniority in the room as this mix can inhibit people from speaking 'in case they say the wrong thing in front of the boss'. If one or two people seem especially quiet, it can be useful to monitor their body language. Sometimes, you may simply notice that someone's facial expression changes and it can be a nice way of *gently* inviting them in to a conversation ("Joan, I thought I noticed your expression change there… did you have a thought on this..?").
MESSING AROUND IN THE MIDST OF GROUP WORK *including side talk/jokes, whispering, etc.*	Don't get in to a power struggle with the 'jokers' by commenting on the behaviour or by trying to control them ("we're losing a bit of focus here!"). Equally, use your judgement – if the behaviour persists, don't ignore it for too long.	People are likely to have become undisciplined because they are overloaded or worn out. Has the topic become boring and stale? Do people need a break? Or perhaps people need time for small group discussion? Check in with the group, especially those who seem to be distracted. This may quieten things for a while. Ask the group if they need a breather or a stretch or if the pace is OK for them. Take a quick break or bring a scheduled break slightly forward (if possible). With warmth and humour, you could make an appeal for order (for example, "I'm finding I'm being a bit distracted by some fun over here… can we all share the joke?!").
GROUP SEEMS LOST IN SOMETHING TRIVIAL	Try not to lecture the group about wasting time or 'going round in circles'. Don't doodle, daydream, or think to yourself, "It's their own fault we're not getting anything done"!	You can use your own sense of disconnection or lostness and bring it to the attention of the group ("sorry, I'm feeling a little lost in this discussion… "). This is often enough to get the group to notice what is going on. Invite the group to take a quick 'mental time out' and reflect on whether they are discussing what they want to be discussing at this point. Indicate that you're worried about finishing on time/covering all of the material and then just check with the group if this discussion is needed…
SOMEONE BECOMES REPETITIVE OR EVEN STRIDENT	Never collude with the group by trying to distance this person. And, of course, don't try to browbeat them.	This is usually a sign that the person feels that they haven't been listened to or 'heard'. See if you can help them feel understood by summarising the person's point of view and checking with them that they're happy that you captured it well enough.
SMALL GROUPS BEING DOMINATED BY ONE PERSON	Doing nothing, hoping that it'll resolve itself. It usually doesn't.	Check in with the group, gently and respectfully ("just wondering how you are doing… Are you all getting a chance to get your point of view across?"). Or you can suggest that a round-robin* can often be a good way to make sure everyone's perspective is included. If this doesn't work, you can invite the dominant individual to be the note-taker so that they are given a role which requires them to listen to others. ** a round-robin is simply going around the group in sequence so that everybody makes a contribution in turn*

CONSOLIDATING AS YOU GO – MINI-REVIEWS

Before looking at the issue of evaluation, it makes sense to start checking out whether you're 'on course' before you get to the end (after all, if you leave it to the end to find this out, you have no further opportunity to bring things back on course if necessary). So, during the session, it can be useful to remind people of what they have just learnt and, in doing so, to help them feel that things are 'sinking in'. One of the easiest ways of doing this is to engage in quick reviews throughout the session. For example, if you were doing a day with a group, it might be good to review just before the mid-morning and mid-afternoon breaks and just before lunchtime too. These reviews will help you to monitor if you're on or off course, and they can really help to engage people, helping them realise they are learning and that the session is a good use of their time.

The reviews don't have to be exhaustive. One of the easiest ways of doing them is just to ask people to split into pairs and to name 3 things they have learned about the topic. Give them a few minutes to think, then invite people to tell the group about what they have learned. List the 'learnings' on a flipchart, as rapidly as possible so as not to lose energy. Then admire the list and thank the group!

CLOSING THE SESSION

This is possibly one of the hardest and most important parts of the session. It is often a part that is skipped, as people are trying to get away or because it can feel a bit awkward to properly adjourn. Nonetheless, it is useful to allow time for the transition and leave-taking, for marking the end of the session, for allowing people to say goodbye and move back into their normal day. The human brain remembers beginnings and endings more than middles (Hogan, 2003), so it is important that you take the time to end well.

You need to take account of the nature of the session when thinking about how to close it. Basically, the longer the learning event has been, the more time you should invest in the ending. To give a rough idea, if it has been a day-long workshop, Hogan (2003) suggests allowing for up to an hour to enable people to consolidate their learning, to plan some action steps, give feedback, and say goodbye. This is particularly the case if the workshop has been interactive and people have been invited to disclose something of themselves in it. However, it the session simply consisted of one or two relatively impersonal presentations with little engagement between participants, the ending may be much more perfunctory ("thanks and goodbye").

Of course, you want people to remember what they have learnt and to go away feeling they have achieved something. Having a good close to the session can really help to ensure that people remember what they have learnt and, therefore, be much more likely to put it into practice.

So, when drawing a session to a close, ensure you leave enough time to:

- Replay to the group what they have been doing - tell them what you have told them, remind them of the ground that has been covered, where you started from and the initial objectives, and the range of topics and themes that you (and they) have covered over the course of the session. Remind people too, where possible, about how they can apply this learning in their own workplace.
- Agree and record the actions and 'what's next' including how notes of the session, or documents that you have handed out to participants, are going to be circulated/used.

- Even if you are asking people to complete formal written evaluations of the day, it is really useful to have a quick interactive discussion whereby you can gain immediate feedback. Let the group know that you'd really welcome some informal feedback and then ask some questions such as: –
  - Did the workshop meet your expectations? *(remind them of the expectations they identified at the beginning which you may have captured on a flipchart and which may be still displayed)*
  - Is there anything you would have liked to be different (liked more of or less of)? Is there anything that is still worrying anyone, any 'unfinished business'?
- At the end of the session, get people to commit to some action. If people are leaving to work on their own, ask them to identify one thing they will do differently. If they have worked well in pairs during the session, you can suggest that they 'co-contract' with their partner to get in touch with each other in, say, a week to see if they have fulfilled their commitments. If you have small groups that may meet again, one way is to ask each group to write down what they will do differently and by when. Then, ask the groups to swap these and suggest that, when they next meet, the groups can challenge each other to see if they have done what they said they would do.

A useful way of summarising a lot of the above and helping people to review what has happened is to think of a mini-learning cycle, such as the one here in the diagram. This reminds people of what they have just experienced (the **what**?), invites them to reflect on how they feel/think about it (**so what?**) and then asks them to think about what they'll do next (**now what?**). It is a slightly truncated version of the adult learning cycle that was described above in Section 2 of this Manual. Appendix 3 also contains some good review and reflection questions for facilitators.

Down through the ages, people have used rituals to mark transition points and endings. There are many rituals which groups can engage in at the end of a session, even groups which have only come together for the first time for this learning event.

A simple ritual is to ask people to reflect back on the day/session, and identify one thought or insight or experience they want to take away. If people are happy to do so, you can share these amongst the whole group (with each person being invited to say one thing that they are taking away). An even simpler version is just to ask people to think of one word which is significant for them arising from the session, and to say that one word. People don't have to give lengthy explanations of the significance of the word for them. Some people can find it really hard to identify one thing and more shy people might feel self-conscious about sharing their reflections. So it can make life easier for participants if you have some props you can use at this stage, such as 'angel cards' (cards with single words written on them, such as flexibility, change, challenge, growth, sadness, etc.) or a set of photographs or even emoticons. People can simply choose a word, photograph or 'smiley/frownie' which is significant for them.

Another simple ritual that can help mark the transition is to just circulate a sheet of paper on which people write their contact details, and then each person can take a photograph on their phone of these details.

And finally, don't forget to celebrate the learning. Each participant has invested in being at the session and this should be respected and honoured. Learning in organisations can often be personally challenging too – there can be a risk that we will look silly or foolish or incompetent. So help the participants to celebrate their experience by ending with something small, such as a chocolate for each person, or by inviting them to buy a present for themselves for having taken the risk and put in the time!

TEN MORE TIPS FOR FACILITATING LEARNING IN GROUPS

1. If you find yourself being **challenged by one person**, stand your ground – quite literally. It will help you *feel* grounded and model to the group that you are not going to be 'pushed off focus'.
2. Avoid '**death by feedback'** by keeping feedback short (set a time limit and keep to it). This is especially relevant if a particularly dominant person has been nominated as a spokesperson and where you have more than three/four small groups providing feedback on their work.
3. **Don't read straight from your presentation slides:** they should be used as a prompt, not as a script. Simply standing at the front of the room and reading from your slides is a sure way to lose the attention of your audience!
4. Use people's names as much as you can early on. Referring to people by name helps to **build rapport** and create a **positive working environment.**
5. The use of **jargon and acronyms** can exclude people if not everybody in the room has the same level of knowledge or understanding. To discourage the use of jargon, place red cards on the tables and encourage the group to raise the card if and when they feel someone is talking in a jargonistic or exclusive way.
6. **Clarify points** if you don't understanding them - others in the group may not either.
7. **Use participants' language** or language that is familiar to them. When summarising, use the words of the participants where possible – record it even if it seems odd to you.
8. **Move the group on** if it seems stuck on an issue (simply 'park it' as being 'too big' or 'too important' to deal with now).
9. As an alternative to "shut up!", use a small bell (or a child's toy, if you prefer!) to make a sound that **gets the group's attention** whenever you're struggling to get them to focus on you (for example, after a break, when you're looking for silence, etc.). Introduce this at the start of the session.
10. Keep an eye on the **time** and be ready for a mid-way re-jig of the design if needed.

Adapted from ***NHS Institute for Improvement & Innovation*** *(2009)*

3.3 – AFTER THE LEARNING EVENT – JUDGING ITS VALUE

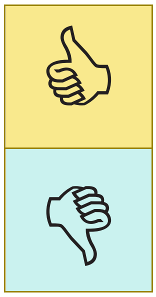
REVIEW OF OWN PRACTICE

After any facilitated session, it is useful to take a little time and to review how it went. The purpose of this self-review is for us to reflect back on it and draw our own conclusions about what worked well, what didn't work so well, what we might do differently in future, etc. Appendix 3 of this Manual contains some useful questions to help you in this type of post-facilitation reflection.

EVALUATION

We are all familiar with the idea of evaluation - that is, establishing if an intervention has made any difference and, if so, if it has made the difference that was intended. Informally, evaluation is something we do a lot of the time. Whenever we buy anything or do anything, we are likely to form judgements about it. Evaluation is, therefore, the attempt to find out the value, merit or worth of something (however that might be defined).

However, making the time for a more formal evaluation is often overlooked. Without formal evaluation, we cannot know whether our work, as facilitators of learning, has been worthwhile. We may not know if people learned anything at all, if they learned it efficiently, if we did indeed make it easy for them (remember our definition of facilitation?), or if it was useful when they were 'back on the shop floor'.



There are two aspects of any learning event that can be evaluated. The first is the **content** (the subject matter), and the second is the **process** (the way it was delivered/worked). In general terms, we need to know if the content was:

- relevant (to participant needs)
- clear
- accessible
- effective (did it lead to the outcomes for which it was intended)?

We also need to know if the process was

- appropriately enjoyable and comfortable (the right balance of support and challenge)
- designed and delivered in a way that was respectful and conducive to learning?

These are often called **summative** and **formative** approaches to evaluation. The summative approach focuses on outcomes (did the learning take place?) and the formative approach focuses more on the process that was used to enable (or disable!) the learning.

Remember, just because you evaluate (seek formal feedback from participants) does not necessarily mean that the participant perspective is the only perspective that is relevant. If you have been 'commissioned' by one party to deliver training to a second party (or group), you should evaluate with both parties. It may well be that you satisfy one, but not the other. For example, you might have delivered content that the commissioner asked you to deliver, but if the participants were not aware of the need for that content, they could evaluate it quite badly. On the other hand, if you have facilitated a great session, but people cannot put into practice what they have learned, their evaluation might be quite mixed and reflect a good deal of frustration. So, the evaluation has to be relatively sophisticated and multi-party, if relevant.

One of the most respected approaches to evaluating learning is Kirkpatrick's four-level evaluation model. This model is a good way to think about evaluation as it deals with some of the problems just described.

1. The first of the four levels is the **participants' reactions** at the end of the session or intervention. These are assessed through forms (often called "happy sheets") that people complete right at the end of the learning event. These forms allow people to let the organisation know if the event has met their expectations. These forms can be used to invite participants to suggest things that might be done differently too, and to give an overall assessment of how they found the event (e.g. by giving it marks out of five). An example of a participant reaction sheet is given in Appendix 1 to this Manual.

2. In addition to the participant reactions, we also want to know if participants have **learned**, that is, if they have acquired the knowledge (or information) or the skill or the perspective (attitude shift) that was intended. This can be assessed after the workshop when people are back at work. It needs to be managed carefully, though, as different people may have different assessments of how much learning has taken place, so thought needs to be given to who makes this assessment. Often, this type of evaluation is done by assignments, or tests, or quizzes, or videoed role-plays, but many people question whether this is a good way of checking whether true learning has taken place. A further complication is that it can be difficult to assess more qualitative learning (such as attitude shift).

3. Assuming that participants reacted well to the event, and acquired the knowledge, skill and/or attitude that was intended, it is worth considering whether or not this learning **transferred into on-the-job behaviour** change. They may have demonstrated proficiency in the training room, but were they willing and able to put the learning into practice in the outside world? Outside the training room, they may have met all manner of fear or resistance in themselves and/or in their peers or colleagues, resistance that impeded the application of their newly-acquired knowledge, skills and attitudes. If the evaluation at levels 1 and 2 is positive, but is negative at level 3, it may be that there is something going on in the on-the-job world that needs to be taken into account in the design of subsequent learning events.

Figure 10: Four-Level Approach to Evaluation (adapted from Kirkpatrick, 1994)

Participants themselves can give feedback as to the degree to which they have applied the learning. It can also be interested to talk to peers and managers about their sense of how much actual behaviour change has occurred. This can be a highly-charged exercise, however, and needs to be handled carefully.

4. Of course, we are all familiar with the adage about the proof of the pudding. So, anyone in the business of facilitating learning will want to know about the outcome or **results** of the learning intervention – did it lead to better patient care? Improved customer feedback? Reduced risk? Fewer complaints? Better efficiency? Better morale? Ultimately, the value of all interventions is judged by the outcome, especially by those who foot the bill or who pay the price (which can include those who pay a non-financial price, such as colleagues who have to work harder to free up peers to attend a training course).

In practice, formal evaluation at all four of these stages is rare. As has been mentioned, it can be a complex exercise to undertake. However, it is worth bearing all four levels in mind as, as was mentioned already, other people are making these kinds of evaluative judgements all the time.

If you are evaluating a learning event that you have facilitated, you will want to know not just ***if*** it was successful, but also ***why*** (what worked well and what didn't work so well). The best advice is ask participants at the end of the session for feedback on precisely these two aspects, and then – if you can – follow up some weeks later to see if they put their learning into practice and if it had the desired results.

COMPLEMENTARY APPROACHES TO LEARNING

In addition to classroom-based training interventions, or even learning interventions which are presented 'at the bedside' or 'on the job', it can be useful to complement training-type interventions with other ways of learning.

Some of the more common alternatives/complementary approaches are mentioned briefly below, along with some general guidance as to how a facilitator might build them in to a learning process.

ONE-TO-ONE TEACHING

One-to-one teaching is, as its title suggests, instruction or facilitation of learning by one person (the 'teacher') and another (the 'learner'). The need for learning can be identified by the learner or by the teacher, especially if the teacher is a line manager or has some role that involves quality assurance of the learner's performance. It can be used both with inexperienced and with seasoned learners and is especially useful for those who might have difficulty or extreme discomfort in admitting to learning needs in front of peers or others. It usually involves close behavioural observation of the learner, along with structured feedback and close guidance as to what to do differently. If the relationship is good, it can allow the learner to admit to difficulties or concerns they may have about their own performance. Because it is so specific to this learner at this time, the teacher or facilitator can build on the learner's existing knowledge and can, in effect, customise the teaching to the learner's actual needs. In this way, it can be very powerful.

If you are facilitating people to learn, you could build in the opportunity for some one-to-one teaching for individuals by getting their manager involved in follow-up support to the person. People can be encouraged to involve their manager themselves (by 'contracting' in advance for some one-to-one follow-up), or you can design the learning intervention in such a way that managers have to be involved in follow-up one-to-one support in order to get their team member a place in the learning event.

ONE-TO-ONE COACHING OR MENTORING

One-to-one coaching or mentoring is usually something that takes place away from the 'shop floor' and can involve a trained coach (internal or external) or a mentor (internal or external) working with the client ('coachee' or 'mentee') to help the client develop his or her competence. These approaches are usually more geared towards longer-term management / leadership development rather than on-the-job skills or practice development. Many people have formal mentoring relationships which they have created for themselves. Within the HSE, there are schemes in place whereby the organisation (usually, local HR) can help people who are looking for a coach or mentor. If you think this might be for you, you can inform yourself further about how it works and what to expect by downloading the HSE's Guide to Coaching / Guide to Mentoring (at the time of writing, available from HSeLanD or by calling HR Leadership, Education and Development). As a facilitator of learning, you can also think about encouraging learners to follow up their own learning by seeking to work with a coach or mentor.

FACILITATING LEARNING IN GROUPS

ACTION LEARNING SETS

Action Learning Sets are small groups of people who come together on a periodic basis, often with an external facilitator, to learn together. Action Learning is a particular approach to learning which is based on individuals, with their peers (or Set), identifying problems, taking action and then reviewing and reflecting on that action. They can then take further action and repeat the cycle. These Sets are a very good way of complementing the more theoretical learning that frequently takes place in classrooms or via the internet as they give people a fantastic opportunity to learn from trying things out in practice. Action Learning Sets are a relatively common feature in health services and are often put in place to support training and development programmes delivered off-site.

As a facilitator, you might consider establishing action learning sets which meet, say, monthly for six months following a learning intervention. You would need to give thought as to how the Sets are formed and who might facilitate the Set meetings. You will also need to contract for this at the outset as it will mean ensuring that learners can be released for Set meeting participation and there may be additional expense involved.

PEER BUDDIES

Peer buddying is a way of learning that is as old as the hills, as they say. People have always helped each other to learn in a variety of settings, whether as brothers and sisters, as people who start work on the same day, or as 'old hands' who give new apprentices the benefit of their knowledge. Peer buddying is usually just this – two people ('buddies') who usually join up informally and help each other on the job.

Of course, it can be made more formal too, such as when someone is being inducted to a new job, or in a master-apprentice type relationship, or by being put "sitting next to Nellie" which is how many people have learned how to do their job ("Nellie" being the person who has been doing it for years!). It can be more formalised too as a support to people who have learned together, perhaps who have just undertaken a workshop or course together, insofar as the facilitator asks everyone to identify a partner or buddy for themselves, someone they can contact/check in with from time to time to see how they are getting on in applying their new learning.

JOURNAL CLUBS

A journal club is a meeting or a group of people who get together on a regular basis, often within the routine work structure (e.g. lunchtime meetings), to critically evaluate books, research papers or other articles/ publications. Each member of the club is asked to read the designated piece of writing in advance – it will usually be a topical book or paper on a subject of mutual interest. The club members meet, appraise the article, ask questions about it, and review its relevance and applicability to their work. They may further agree to adapt some part of their current work procedures arising from their consideration of this (usually, new) writing. They can also work by having one member lead a presentation on the writing and then prompting reflection and questions.

There are no hard-and-fast rules about how journal clubs should be run. If you, as a facilitator, are considering recommending that people form a journal club, it is worth giving them some guidance on what they need to do to schedule meetings, identify writings, and work together in a semi-structured way at their journal club meetings. Such guidance is readily available on the internet.

FACILITATING LEARNING IN GROUPS

(CLINICAL) SUPERVISION

Clinical supervision is a well-established feature of the ongoing development of many health and social care professionals, including therapists, social workers, mental health nurses, etc. Its purpose is to safeguard patient care by giving care deliverers a chance to review and improve practice. It is a process which involves regular meetings between the 'supervisor' (an established practising professional) and the 'supervisees' for the benefit of the supervisees. The benefits of supervision are said to fall into four areas (HSE, 2015) including ongoing work planning management, support for supervisees, learning and development of supervisees, and engagement and communication generally.

As a facilitator of a learning event, it is unlikely that you will be putting supervision structures or processes in place for learners but you can strongly encourage those who take part in a learning intervention to bring their application of it to their supervision discussions.

USING ONLINE RESOURCES

The internet is an incredibly rich source of education and learning materials. Unfortunately, in some cases, access is not always easy and the materials are not always good or user-friendly. Care needs to be taken if you, as a facilitator, are recommending that people complement their own learning with material they source online, as you don't want them to alight on material that is poor or that might get in the way of their good practice.

Of course, Wi-Fi and the internet also enable people to be in touch with each other remotely. Some of the methodologies mentioned above can take place via online connection too – for example, virtual journal clubs, online coaching / mentoring or buddying sessions, or even action learning set meetings when the group is established. There are free or inexpensive resources which can enable this contact for example, Zoom – www.zoom.us) but participants will usually need access to Wi-Fi.

The next session of this Manual provides some further general guidance on the topic of making good use of online learning.

4. ONLINE LEARNING

WHAT IS E-LEARNING OR ONLINE LEARNING?

A simple definition of e-learning or online learning is using computer or communications technologies for learning-related purposes. It can be as simple as students watching a video documentary in class, or as complex as an entire university course provided online. Technology-based learning began decades ago with the introduction of video players and over-head projectors in classrooms and has advanced to include interactive computer programmes, 3D simulations, video conferencing and real-time online discussion groups comprised of students from all over the world. As technology advances, so does online learning, making the possibilities endless.

So what does online learning look like these days? The answer is that the number and range of these learning activity types is ever-growing, as technologies develop and as universities and others invest more and more in this type of teaching. To give you an idea, below are some common types of online activity.

(Please note that this area is a very fast-moving one and the references below to websites and/or software may have changed/moved/evolved since the time of writing.)

- **Fully online education/training courses**, designed for people to use independently in their own time. These courses are usually highly structured and interactive and include text (theories, models, etc.), video clips, interactive quizzes, end-of-module 'exams', and credit tallies including a customized certificate upon completion of the course. Good examples of this type of structured online learning course are to be found on **HSeLanD**, the **H**ealth **S**ervices **e-L**earning **an**d **D**evelopment service. Examples of such structured online learning courses on HSeLanD are "Ted's Story", a six-unit online learning resource for nurses involved in care of older people, or the "Foundation Programme for Support Services Staff: Communication".

  A recent development in this type of activity is the availability of MOOCs (Massive Open Online Courses), which are accredited courses usually offered free by universities, often to encouragie people to enrol in paid courses. An example of this type of course is the University of Tasmania's 'Under-standing Dementia' (at the time of writing (2016), available at www.utas.edu.au/ wicking/wca/mooc).

  There are many other free high-quality educational resources, suitable for a wide audience and available online, such as those offered by the Khan Academy (www.khanacademy.org). These are often a great way to introduce e-learning as people can learn something of personal interest or 'for fun' where is none of the anxiety associated with having to learning something for professional or work reasons.

- **Mixed offline/online courses** – often a combination of offline and online learning, with students reading and working on material in their own time (offline) and with the online portion mediated by a lecturer or facilitator through virtual collaboration software such as Adobe Connect or Blackboard. This type of software allows lecturers to show slides and video clips, lets participants post live questions (texting or speaking), and can even allow the facilitator to group people into small groups where they can interact with other for some time before coming back to the live session.

> **There is a vast array of real-time collaborative technology available… including videoconferencing, virtual whiteboards, share screens, messaging or 'chat' software, web browsers and the humble telephone.**
>
> *Smith et al (2015)*

- **Blended learning** is a term that is often used to describe the blend of classroom-based or face-to-face learning with some online learning. In a blended-learning course, for example, students might attend a class taught by a teacher in a traditional classroom setting, while also independently completing online components of the course outside of the classroom.
- **Online material** – of course, some of the biggest sources of online educational material are those that contain vast amounts of videos, talks, and text that are not part of programmed or structured courses but are nonetheless very informative, such as YouTube, TED Talks, Google Scholar and Wikipedia. This material is usually free and often world-class but it is not always quality-assured. Nonetheless, it is a good start to encourage participants to inform themselves through these types of portals as it can really stimulate their curiosity and help them become adept managers of their own online learning.
- **Online reflection and discussion sessions** – e-learning can encompass much more organic or free-flowing group discussion as well as formal structured educational courses such as those mentioned above. Real-time or 'live' discussion boards or forums, where people post their thoughts and comments and these are 'threaded' to different topics, have been around for some time in both ordinary and educational use. Nowadays, with good Wi-Fi becoming the norm, there are free or at least cheap software applications (apps) that can allow people to talk online using just smartphones (or laptops or PCs, of course), such as Skype and Zoom. Facilitators can relatively easily offer online discussion sessions as a complement or follow-up to classroom teaching – for example, inviting everybody to take part in an online lunchtime 'catch-up' Zoom session one month after a workshop to see how people are implementing change.

A quick summary of some of the common advantages and disadvantages of online learning is below (adapted from Hogan (2003) and Jaques and Salmon (2007)).

STRENGTHS / ADVANTAGES ASSOCIATED WITH ONLINE LEARNING	CHALLENGES / DISADVANTAGES ASSOCIATED WITH ONLINE LEARNING
· Can give more flexibility to participants to learn at their own pace, in their own place, often at a time that suits them. · Removes the need to travel, so reduces fatigue and expense and minimises 'down time'. · Participants may be less nervous as they are in their own place and not physically confronted with each other. · Conversations can be recorded (depending on which software is being used) so that both teachers and participants can have a record of what they did and the subject matter that was covered. Recording a session also means it can be re-used for those who could not take part. · Some software apps are already very comfortable for people (e.g. Facebook) so it can be relatively easy to incorporate them into education and learning. · Some people (e.g. introverts) may prefer to learn on their own and without the distraction of a group of people around them.	· People need access to appropriate hardware and software, including Wi-Fi. · 'Teachers' and learners may need training in use of virtual learning environments. People are often very daunted by the technology associated with e-learning and often need a lot of time 'practising' to become comfortable and confident. · Body language is much reduced in the physical environment - this can make communication harder and people have to pay more attention to micro-cues (such as tone of voice or choice of word, which are open to misinterpretation). · The possibility of recording the session can make people wary of saying things or writing things down (on e-blackboards). · If audio is not available, and people are relying on conversing by text, conversations can be much slower and people can be nervous about writing online (worried about the speed of their typing, their spelling, etc.). · Participants can opt in and out at different times, can be distracted by what is going on in their own office or home and, if this happens in a live session, it can be difficult for the facilitator to engage them. · There is the constant possibility of technology (or technology user) failure.

FACILITATING A BLEND OF ONLINE AND FACE-TO-FACE LEARNING

This Manual can not cover the topic of facilitating group learning through the delivery of online lectures/ seminars or through using the kinds of sophisticated collaborative technologies that are widely used in universities these days (such as Blackboard). This topic is simply beyond the scope of this Manual and it is judged unlikely that this type of facilitation will become widespread in the short- to medium-term in workplace-based learning.

We will focus here on two relatively simple aspects of online learning that are becoming popular: (i) where people want to become self-directed learners through using HSeLanD and (ii) setting up online real-time discussion groups, using Skype, Zoom, Google Hangouts or some other free and easily available software.

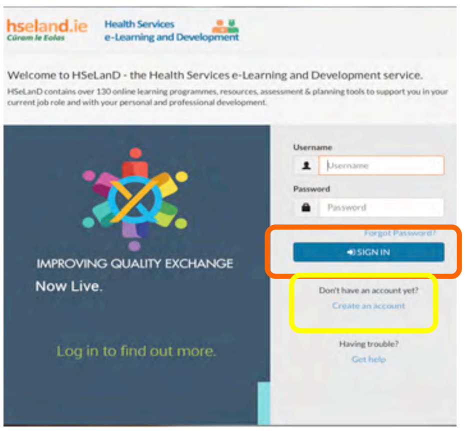
HELPING PEOPLE TO BECOME SELF-DIRECTED LEARNERS THROUGH USING HSELAND

To start with, you will need a computer (or smart phone) and a good internet connection. It is easier to use a computer as some of the material works better on a wider screen. Everyone can find HSeLanD on the internet and, for many HSE staff, access to HSeLanD is also available through the HSE's intranet.

ACCESSING HSELAND

This next section may be a bit simplistic for those who are regular web users but it is written from the perspective of someone who may be just an occasional user and who has never accessed HSeLanD before. As a facilitator of others' learning, you may already be quite familiar with HSeLanD and so you can simply skip this section or quickly read through it and pick up the sequence at whatever your point is appropriate for you. As a facilitator of learners who may be using HSeLanD for the first time, it may be useful for you to have this guidance so that you can help them to access the vast range of material available on HSeLanD.

Start by finding the HSeLanD website using whatever browser you normally use (e.g. Google). Simply enter "hseland" and it will take you to the appropriate webpage (www.hseland.ie). You will see a screen that looks something like Website Picture 1 here[1]. If you have not already registered or created an account with HSeLanD, this is the first thing you must do - otherwise, you will not be able to access the material. Create your account (by clicking the link, i.e., where it says 'create your account' – the yellow highlighted box in the picture) and you will be taken to the Registration page. Register by completing the online form.



Website Picture 1: Signing in to HSELanD

Note: you will need an email address to register. You can use a work email address (such as *jo.bloggs@hse.ie*) or a personal one (such as *Jo.bloggs1980@gmail.com*). If you don't already have one, the Registration page will give you the option of clicking a link to Google where you can create a free gmail account for yourself. You will also need to think of a username (e.g. "Jojo") and password for yourself.

Once you have your HSeLanD account, you will just need to click the blue SIGN IN box (see orange highlight in picture above) whenever you revisit.

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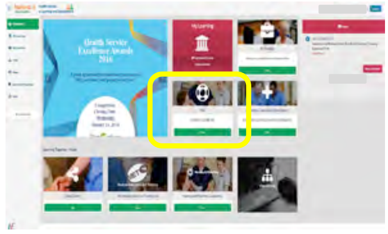
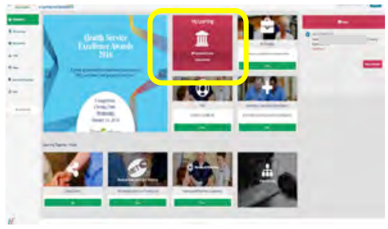
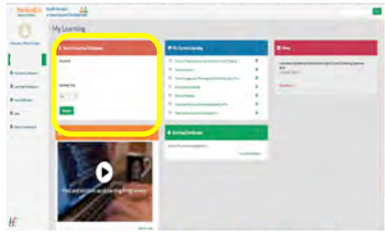
[1] This view of the HSELanD opening screen was taken in mid-January 2016 – it is quite possible that the view you get when you open this page will be slightly different as the picture on the left hand side moves continually once the page is opened. The key part of the page is

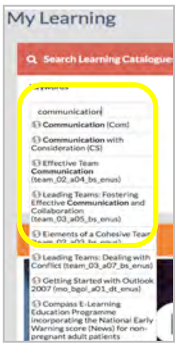
Once you have signed in, the next page you will see is the HSeLanD dashboard. This is a page where there are lots of entry points to different 'pages' on the HSeLanD site – for example there is a My Learning page, a Help page, and lots of learning hubs for different professional groups and interest groups. The picture alongside shows how this dashboard page looked in mid-January 2016. If you are new to HSeLanD, it is strongly recommended that you click on the Help page (on the list of options on the left-hand side of the dashboard page or by clicking on the icon box in the centre – see yellow highlight in Website Picture 2). This Help page contains really good step-by-step video guidance as to how to find a course, enrol on a course, complete a course, etc.


Website Picture 2: Getting Help on HSELanD


Website Picture 3: 'My Learning'

For the purposes of illustration, let us assume that the topic of interest to us is 'communication' and we want to see if there are any online courses available on HSeLanD on this topic. Start by clicking on My Learning (on the left-hand side of the page or by using the icon – see highlighted box in Website Picture 3). This will open a My Learning page (see Website Picture 4) which will give you the option of searching the learning catalogues on HSeLanD by using the key word 'communication'. Also on this page, if you need a little reassurance, you can go to the box below ('Help') and look at/listen to a video guide on how to find the course you are looking for.

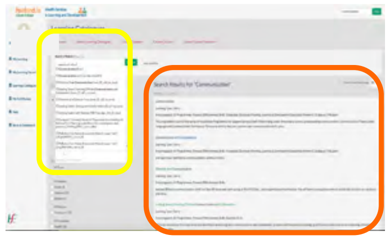

Website Picture 4: Find a Course Using a Key Word

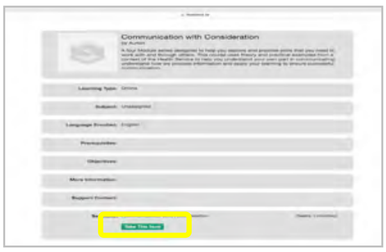


Website Picture 5: Options for Courses

Once you enter the keyword, the site will offer you a list of courses on that topic (see Website Picture 5 for example) and, in that drop-down menu under your keyword, you can click on the course that seems most suitable for you. Note, for very specific words, such as 'cannulation', you may only be offered one course option if there is only one online course available on this subject.

If you simply hit the return button after entering your keyword, you will be taken to more refined search page (see Website Picture 6) and you will again have to enter your key word. This will lead to you being offered the same drop-down list of courses directly below your keyword, and it will show you the courses in more detail (see orange box in Website Picture 6). This more detailed listing is very useful when using key words such as 'communication' as it allows you choose which of the available options on that subject are of most interest to you.


Website Picture 6: Finding your Communication Course



Website Picture 7: Accessing the Chosen Course

Let's assume you like the second offering, a course called 'Communication with Consideration'. Hover your mouse pointer directly over the on-screen title of the course and then click to gain access to it. This will take you to a course opening page that looks like Website Picture 7. Your next step is to click on the green box at the bottom ('Take This Now'). Please note that, for some courses, such as those which require you to complete some pre-course activities, instead of the 'Take This Now' green box, you may be asked to click on a box which says 'Enrol' and then you will be taken to a further page which asks you to click on a box to 'Confirm Enrolment'.

When you click on 'Take This Course', you will be taken to the opening page of the 'Communication with Consideration' course (see Website Picture 8). You will see that the course contains four modules or chapters, and that the bottom half of the page offers a list of links to other webpages containing resources and materials that may of be related interest.

Website Picture 8: 'Communication with Consideration' opening page

Start your work on the course by hovering your mouse pointer over the first module (see highlighted box) and click.

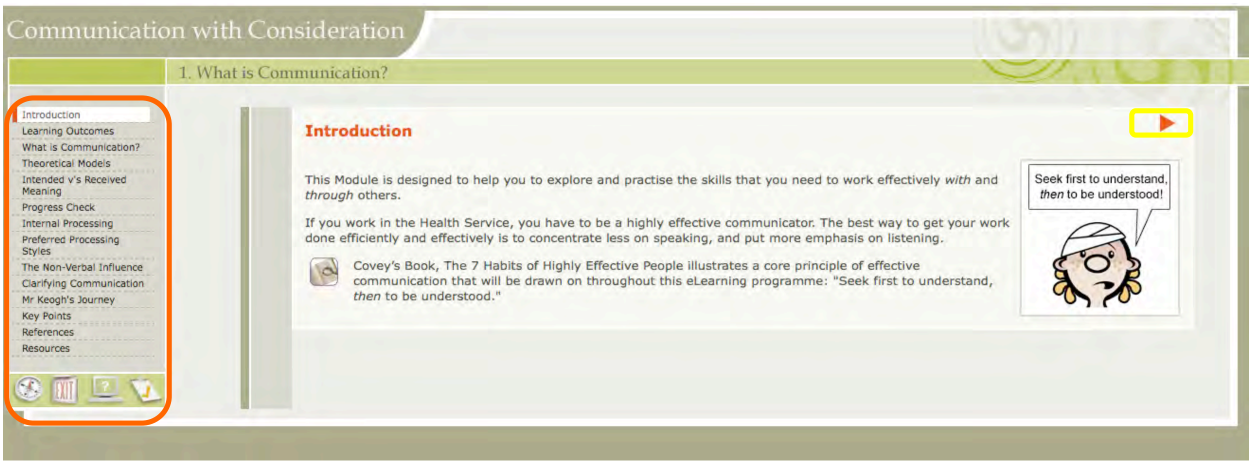
You will then be taken to a page which welcomes you and gives you a very brief introduction to the icons that are used within the course. To start the coursework itself, click on the START button at the top right of the page (see Website Picture 9).

Website Picture 9: Navigating the Course

Finally, you have reached the beginning of your online learning about the subject of 'communication with consideration'!

Congratulations, especially if this is the first time you have used HSeLanD or signed up for any online courses.

You may be happy to just keep going (following the online directions), in which case just use the red arrows in the top right-hand corner (see yellow highlighted box in the picture below) to move from page to page within the module. You can also use the listing of contents on the left hand side of the page (see orange highlight) to see what is covered by the module and to navigate your way through it – as in most courses, it is best if you proceed through it in the order in which it was designed but, if your learning style is strong visual or auditory (remember the learning preferences mentioned in Section 2?), you may want to start with the video that is shown under the part marked 'Mr Keogh's Journey' and then go back and read more about the subject.



Website Picture 10: Starting the Online Learning about Communication with Consideration

This 'Communication with Consideration' is a good course in which to start your journey into online learning. It is well designed, is of relevance to everyone, is interactive and contains a mix of types of activity. It also allows learners both to do and to reflect (with built-in reflection exercises and activities that can be done offline) as well as to think about applying different models. It allows users to print off a summary of the module too and, for those who want to assess their learning, there is an option to complete an online assessment at the end of each module (by clicking on the assessment icon – see highlight in Website Picture 11).

Website Picture 11: End of Module Assessment

Taking an online course such as this can often feel a little like 'going back to school' in so far as there is a lot of time given over to completing online 'workbook'-type activities. But, if you find yourself struggling with this aspect of online learning, remember that the approach works and has been tried-and-tested all over the world. And, of course, it is self-directed: there is no 'teacher' to tell you what to do, so this gives you great freedom to move around the course as you prefer. Note, however, that you may find that other online courses, especially those which lead to accreditation, do not allow such free movement!

HSeLanD contains over 100 short online courses on a range of personal and professional development topics. It is well worth your time to play around with entering different keywords so that you can see what material might be of interest to you on the site. You can access it through the 'My Learning' icon or you can access material through some of the hubs (for example, nurses and midwives can access a lot of material on the Nursing and Midwifery Leadership hub, St James' Hospital staff can access material through the SJH hub, health and social care professionals can access material through the HSCP hub, etc.). Some of the hubs require you to log in so you may first have to join via your professional or service group.

SETTING UP ONLINE DISCUSSION GROUPS/SESSIONS TO SUPPLEMENT WORKPLACE LEARNING

Let us imagine that you are facilitating a classroom-based workshop on quality and safety in healthcare. People have travelled from over 20 miles to attend the workshop. The workshop covers a lot of issues about quality and about changing practice to improve different aspects of quality. At the end of the workshop, everyone agrees to try out one change in their service area. But there is a bit of grumbling going on, and doubt is being expressed by quite a few of the participants who worry that they won't be able to do what they want to do because their expertise might be questioned, or because they will run into resistance, or because they might hit an issue that hasn't been covered. In all cases, it is clear that they would benefit from some additional support in a few weeks to bolster their confidence and to help them deal with any matters arising. So, you suggest to them that they set up a 'virtual support group' and you offer to facilitate some online support.

USING MESSAGING APPS FOR ONLINE DISCUSSION

This might sound a bit daunting to you if you have not done this before. But there are lots of well-known 'apps' that can help. For example, if you or your group are already users of popular smartphone or computer messaging apps such as **Facebook**, **LinkedIn** or **WhatsApp**, you can create 'members only' groups within these apps where people can exchange text messages, pictures, documents and even video clips. The exact process of creating these member groups differs for the different apps but they all have good help features built into to them which will guide you through the process. The text box in Figure 11, for example, is extracted from Facebook's website and shows how detailed the instructions are regarding the establishment of these groups. The internet is also well-populated with experienced users who are also happy to give advice on how to set up groups within different apps.

Your facilitation of this support might consist of prompting people to post messages (by posting your own check-in messages such as "Hi all, how are things going?" "Anyone had any quick wins yet?" "Anyone hit any major blockages yet?") or by encouraging peer problem-solving ("Anyone got any suggestions to make to Jane who seems to have hit a bit of resistance…?"). And, of course, you can contribute to the giving of advice and problem-solving too when appropriate.

Group Basics - Creating Facebook Groups

What are Facebook Groups?

Facebook Groups make it easy to connect with specific sets of people, like family, teammates or coworkers. Groups are dedicated spaces where you can share updates, photos or documents and message other group members. You can also select one of three privacy options for each group you create.

How do I create a group?

To create a group:

- *From your home page, go to the **Groups** section on the left side menu and click **Create Group**.*
- *Click **+ Create New Group** at the top of the page. A window will appear, where you'll be able to add a group name, add members and select the privacy settings for your group.*
- *Click **Create** when you're done.*

*Once the group is created, you'll be taken to the group. To get started, click at the top right of the group and select **Edit Group Settings**. From here you can add a group description, tags, set a group email address and add a group picture.*

Figure 11: Help from Facebook on setting up private groups

Just as with face-to-face facilitation, it is a good idea to think about and agree some ground rules for these online support /discussion groups. For example, you may need to think about some aspects of "netiquette" (rules for online or social networking behaviour) that might be appropriate, such as whether or not to restrict the use of capitals, emoticons and shorthand 'text-ese'. You should also pay attention to the privacy settings you want to create around your group. In addition, you will need to be clear to people about how much time you, as the facilitator, are going to give to participation in the group. If you don't make this clear, you leave yourself open to the expectation that you are available to the group on a 24/7 basis for support, advice, problem-solving, refereeing, etc.

USING VIDEO CONFERENCING FOR ONLINE DISCUSSION

If you want to engage in scheduled video discussions with your group of learners, there are some very good applications that can enable this. Many of these are free (up to a certain group size). Some of the more popular of these 'virtual meeting' apps include Google's **Hangouts**, **Zoom** and **Skype** but there are others too. Both Hangouts and Skype can support video 'chats' with up to 10 people and Zoom with up to 15[2]. Hangouts has mixed reviews and seems to work best for people with existing Google (Gmail) accounts. Skype allows for free one-to-one calls but, if there are more than two people involved, one of them will require a Skype subscription. Skype is owned by Microsoft and so is reported to be more compatible with Windows/PCs than with Apple Macs. Zoom allows for free video conferencing for the highest number of people and works on both android and iPhones, iPads, PCs, etc. Zoom will ask for a work email address or you can use an existing Facebook or Gmail account.

[2] *As has been noted earlier, the online world is a fast-moving and ever-changing one. The information given here about the availability and use of different software apps was correct at the time of writing (January 2016) but, unfortunately, things may well have changed by the time of reading or use.*

In all cases, all of the users will have to download the required software onto their device (smartphone, laptop, etc.) to enable them to dial in. These downloads are available from the Google play (Android) store or from the iTunes App store (iPhones). For Zoom, the best place to start is by going to Zoom's own website (www.zoom.us) and looking for the 'Sign Up Free' click box on the upper right hand side of the webpage. By signing up for free, you can (at the time of writing) have video conference calls with up to 15 people for calls of up to 40 minutes' duration. For Skype, at least one user (usually, the facilitator) will have to have a Skype 'premium' account but other users can participate for free. If you are planning to build in the use of video conferencing into your group facilitation, you will need to start early as there are a number of preliminary steps that each user must go through before they can take part (regardless of which software you are using), including:

- Downloading the required software or app onto their phone, laptop or PC
- Setting up an account for themselves within that software (you might find that this is part of the download process as you are not allowed to download, in many cases, without simultaneously registering yourself)
- Ensuring that everyone has the necessary hardware (webcam, microphone, speakers, broadband internet connection, video card, etc.) built-in or attached to whatever device they are using (phone, laptop, PC)
- Checking that the software works on all devices (which can involve some troubleshooting if one or more of the participants has problems with their WiFi speed, the processing power/speed of their device, their audio or video camera settings, etc.)
- Letting people know where they can access help if they need it (start by encouraging people to search the relevant software site first – there is usually a good help-page available within the different software sites, e.g. Skype, Zoom, Hangouts).
- Creating a group within the list of contacts – for example, if using Skype, you click **Contacts** (on left hand side of toolbar at top), then click **Create New Group.** You then give the group a name and add each person (contact) to the group.
- Arranging for a trial run of the software by organising a live online video conference. It can be really useful to try out the software when the group is together as, this way, there will be a lot less anxiety for people and they can help each other if they run into problems.
- Communicating the time of the conference to all.

MAKING USE OF VIRTUAL SUPPORT GROUPS (MESSAGING & VIDEO CONFERENCING)

As a facilitator, there are many possible uses of virtual support groups to enable group learning. They can be used on their own, that is, without any accompanying face-to-face meeting, and they can be used to supplement or complement face-to-face or classroom-based learning. In general, it can be hard work to facilitate group learning entirely 'virtually' or online. You will, in all likelihood, have to invest a lot of time setting up a virtual group and supporting them to get online and to work online. But it can be done, and it does offer at least one way in which people can be facilitated to learn even if they cannot be physically in the same place. If their interest or need is strong enough and there is enough 'common ground' between them, virtual groups can work well.

Here are two examples of how a facilitator might use a virtual group to promote learning. In both cases, you will see how the facilitator works hard to engage the participants by asking questions, inviting comments, and by using a variety of learning styles (see Section 2) and, to keep people interested, using video clips as well as messaging.

SCENARIO 1 – USING FACEBOOK TO FACILITATE LEARNING

A new regulation is introduced requiring staff to be able to use a defibrillator. *In this scenario, we are imagining a facilitator working with a group of, say, 20 participants using Facebook to facilitate learning. The facilitator has material which has been developed nationally to show people how to use defibrillators, material which includes text-based slides and video clips.*

The facilitator could start with posting a question to engage people, such as, "anyone know how many people a year in Ireland die of sudden cardiac arrest?" or "can anyone name any signs that might be evident in someone who was having cardiac problems?" or "which of the following {palpitations, shortness of breath, fainting, chest pain, nausea} is NOT likely to be a symptom of possibly imminent cardiac arrest?". Some people will know the answers, others might Google the answers, others might stay silent and let others volunteer some answers – all can support learning within the group. The facilitator could then post a PowerPoint slide showing the correct answers.

The facilitator could then ask if anyone has been involved in a situation where a patient or person was going into cardiac arrest and to post (tell) the story of this experience to the group. Others can be invited to interact with the story-teller by asking questions, commenting, etc. This can make the learning a bit more real.

The facilitator then posts a photograph of a defibrillator in a healthcare setting, just to make sure everyone knows what these devices look like. (Participants could also be asked to take photos of defibrillators in their own settings and post them online so that a 'gallery' of photos of in-situ defibrillators is created.)

Then the facilitator posts a short video of a man who is showing all the classic symptoms of sudden cardiac arrest. Participants can be invited to comment on how they feel when they see this video – is it scary, daunting, shocking, etc.? Some participants may say that they had no idea that the man in the clip was showing classic signs of entering cardiac arrest. This could be an opportunity to invite the group to 'guess' the symptoms and for the facilitator to 'correct' the guesses if they are inaccurate.

Then the facilitator uploads/posts another video clip of a person using a defibrillator to 'shock' someone who is in sudden cardiac arrest. This shows participants how the equipment is used and what the effect is on the person receiving the treatment. Again, this could be followed by an invitation to people to comment on the video and share their reactions to it. The facilitator could post the direct question "how do you feel now about possibly using a defibrillator to treat someone who seems to be going into cardiac arrest?". This will give participants an opportunity to voice any concerns they may have.

At this point, the facilitator reminds people that they are not expected to be cardiologists and that defibrillators are purposely designed for use by 'ordinary people'. The video clip (of the man being given defibrillation treatment) is reshown, but this time in chunks, with each chunk being summarised in text. So, for example, the first chunk might show the man struggling to breathe, feeling unwell, and then collapsing. This clip would be followed by a summary of the common symptoms of cardiac arrest. The next clip might be of someone recognising the arrest, and frantically looking for the defibrillator. This could be followed by a reminder to viewers to make a note of where the defibrillators are located in their setting. The next chunk might show the part of the video where the defibrillator is turned on and the patches applied to the person receiving treatment. This is followed by a slide summarising the key points (calling the ambulance, following the instructions on the patches, etc.).

After a few chunks of video followed by summary slides, the facilitator might intervene with a quick check in question to everybody ("everybody OK with this so far… any big questions arising?").

The remainder of the video is shown, interspersed with summary slides. At the end, the whole video is repeated as one seamless film.

At the end, the facilitator goes back to asking everybody how they feel now about using a defibrillator (this time, so that the facilitator gets a better sense of how engaged people are, he or she might ask everyone to rate out of 10 how confident they would feel using the defibrillator in their unit/area to treat someone). Assuming that everyone doesn't rate themselves as perfectly confident, the facilitator might ask people to suggest how they might become more confident in the next week or so…? Regardless of which suggestions come back, in order to help people to complete their learning cycle, the facilitator might propose that all participants take some action to familiarise themselves with the defibrillator in their area – perhaps with a colleague or 'buddy', check out where it is located, take it off the wall and look at it, turn it on and notice it charging.

Within the coming week, the facilitator might ask everyone to post something about their experience of looking at the defibrillator in their location and about their feelings now about using it.

SCENARIO 2 – USING VIDEO CONFERENCING TO FACILITATE LEARNING

An external agency has just provided a one-day classroom course on end-of-life care in your setting and you want to ensure that staff are facilitated to get full benefit from it. *In this scenario, you will work with the twelve people who participated in the end-of-life care course so that they get an opportunity to extend their understanding and explore the application of their learning in a practice setting. The twelve staff work across three different sites so you are going to rely primarily on an on-line discussion forum to continue the engagement with this group.*

As the facilitator, you will join the group of 12 at some point in their classroom session to let them know that you are offering this online follow-up and to ensure that they are willing to take part. You will also need to give them instructions as to how to take part, for example, to let them know that the video conferencing software that you are proposing to use is Zoom[3]. If people do not already have Zoom on their phones/PCs, they will have to download it. In order to ensure that the download goes smoothly, you could offer to go through the process of downloading with them, assuming that your broadband service can support this. You will also have to create a Zoom group on your device so that you can invite people to join the conference (you will be the 'host').

Once they have downloaded Zoom, let them know that you are planning to facilitate a video conference call of 30 minutes duration in, say, a week. Give them the exact time and date, of course, as they will have to be free to join the call at a specified time.

Shortly before the agreed time, invite people to join the video call (if people choose, they can take part using the audio-only option). In Zoom, you can invite people to join by sending them an email or text message which, once opened, will offer them the option of clicking a link to join the call. (If this is your first time using video conferencing with the group, you might want to have a trial run the day before, just so you and others can familiarise themselves with the process of setting up and joining the call).

[3] *In this example, Zoom is suggested because it is freely available for sessions of up to 40 minutes with up to 15 participants. Other free video conferencing software is also available. If you are planning to use video conferencing on a frequent basis, it would be better to explore paying for a service, as a paid service will allow you/the organisation more flexibility and functionality than most free programs.*

FACILITATING LEARNING IN GROUPS

When you have everyone 'on board' in the conference, you can facilitate the group as you would facilitate any group – probably starting by just checking in with people, reminding everyone of names, making a little small-talk to relax yourself and others, before getting to the substantive material.

Then you might ask people just to speak about their thoughts and feelings on end-of-life care one week on from the course – just letting people freewheel a bit to get everyone back thinking about the subject matter. If you like, you can offer a summary of the key points to arise from the course or invite participants to suggest the key points that they can remember. Again, this just gets everyone back into the zone of thinking about end-of-life care.

You might then invite people to think about one thing they might do to 'spread the word' about good end-of-life care amongst colleagues that they are working with but who didn't take part in the course. You might also use the conference call to invite people to identify one practice they would like to change (introduce, improve, stop, modify, etc.) in their setting, something that would lead to better end-of-life care for patients. You might like to take notes of the different ideas and suggestions that emerge and you could perhaps email these back to people later. Then invite them to think about what they would need to do to bring about this change – who they might need to involve, etc. You could also suggest that they link up with another participant (outside the conference) so that they could act as buddies to each other and support each other in the changes they are proposing to implement locally.

You might end by wishing everyone well with their continuing learning and efforts to improve end-of-life care in their setting. The participants might also agree to a further one-month-later conference call, which you might agree to facilitate or, better still, one of them might agree to host it and so become self-sufficient!

5. CO-FACILITATION

We are all familiar with the old adage about two heads being better than one. This simple principle is one of the foundation stones of co-facilitation. Co-facilitation is facilitation by two people who work together in partnership to help people learn. Co-facilitation is normally undertaken by **two** facilitators who work together and, for the purposes of this Manual, this is the type of co-facilitation that will be discussed in the main[4].

Like any other type of facilitation, co-facilitation is aimed at making things easier for people to learn. Co-facilitation usually makes life easier for the facilitators too, as it means they can lead on different aspects of the process and take a more observing role on other aspects. For it to work well, however, it requires a lot of planning and relationship-building amongst the facilitators themselves.

WHY CHOOSE CO-FACILITATION?

In addition to the benefit of having two heads, with their two sets of eyes to see, two sets of ears to hear, and two mouths to speak when necessary, there are other reasons why co-facilitation makes more sense than facilitating alone. Here are some of the reasons often given for opting to facilitate with a partner:

- When the group is very large (some people say 20+ is large, but this is not an absolute cut-off and it will depend on what activities you have planned)
- When the subject-matter is likely to create a lot of storming and the possibility even of people storming out
- When the issues to be dealt with are very complex and will possibly run for several months, in which case it can be good to have two or more facilitators involved to ensure continuity
- When a blend of facilitators is indicated, that is, more than one gender, age, race, style or perspective
- When a less experienced facilitator is 'learning their trade' by working alongside a more experienced facilitator and co-facilitation offers an opportunity to model and mentor good practice
- When you need someone who has some specialist knowledge that you don't (for example, you may be the more seasoned facilitator but they may know the service issues much more deeply)
- When there is a need for a mix of external objectivity with 'insider knowledge' of people, power, politics, context, culture, etc.

When co-facilitation works, it achieves the goals of making things easier for the group and easier for the co-facilitators. When it doesn't work, it can make it harder for the group and for the facilitators.

Hogan (2005)

Co-facilitation is often a more intense experience than 'solo' facilitation. It can be richer for the participants, who have two people working with them rather than one, and it can be richer for the facilitators too. Two people facilitating can mean a better balance of energy (when one flags, the other can take over) and can offer a greater variety of styles and approaches. For the individual facilitators, they can avail of an opportunity for peer feedback from someone who is 'in the same boat' and opportunities for this kind of feedback are not that common.

[4] Co-facilitation can involve more than two facilitators. Some models of therapeutic intervention are based on a recommendation of three-way co-facilitation ("trialogue") involving service users, family carers and staff.

However, there are challenges associated with co-facilitation and, if not managed properly, these challenges can really make the experience difficult for both the group being facilitated and the facilitators themselves. In a way, co-facilitation can be likened to an amplifier: it can make good music seem richer and louder, but it can make discordant music very hard to bear. Some of the advantages and challenges of co-facilitation are in the table below.

ADVANTAGES OF CO-FACILITATION

- It's good for learners to get two (or more) perspectives on issues and to be exposed to more than one style of facilitation
- Co-facilitation can be a good way of keeping energy levels high - when the group is flagging with one facilitator, it's great to be able to 'shake things up' by having another facilitator come in
- Facilitation can be tiring - it's good to have someone to work with and 'share the load'
- Co-facilitators can learn from each through review and peer feedback - it's an opportunity for personal and professional growth
- Co-facilitation can lead to a much richer experience for the group, as the two facilitators can provide support to each other to fully attend to the people and the process

CHALLENGES OF CO-FACILITATION

- Co-facilitation requires two people, therefore is twice as labour-intensive and twice as costly
- Smooth co-facilitation does not just happen - it usually requires a lot of work beforehand to build the relationship, clarify how to work together, develop a way of communicating, and ensure mutual flexibility
- Co-facilitation can require good conflict resolution skills as, inevitably, one facilitator will take more time than was planned, will give an answer or a direction that the other doesn't agree with, takes over a piece of work intended for the other, etc.
- Co-facilitation works best when based on the premise of "equal but different" and when there is clarity about which facilitator is leading on which tasks/at which times, etc.

Figure 12: Advantages and challenges of co-facilitation

Getting co-facilitation right requires attention. In particular, it requires attention to relationship-building. The relationship between the co-facilitators is, of course, really important. So too is the relationship between the facilitators and the group. To co-facilitate well, we need to be able to hold our own within these relationships, and we need to be able to support our co-facilitator's relationship with the group. Sometimes it can feel awkward to be natural with a group when we know that we are being observed by a co-facilitator. This 'being observed' factor can cause us to feel self-conscious or even anxious, which in turn can cause us to second-guess ourselves, cause us to modify any of our behaviours that we think our co-facilitator might not like or approve of, and can even cause us to silently compete with our co-facilitator for the affection of the group.

These difficulties are, of course, made worse when we don't know our co-facilitator well (for example, if it is a partnership of a service user or service user's family member co-facilitating with a member of staff) but they can happen too even when we work closely on a day-to-day basis with a colleague. In most circumstances, therefore, it makes sense to get to know our co-facilitator in advance of our work together and to talk through some ground-rules about how we might work together.

ESTABLISHING HOW TO WORK TOGETHER – BEFORE, DURING AND AFTER

Co-facilitation is more than simply involving another person in the delivery of an educational session ("co-presentation"). It is based on the presumption that the co-facilitators are peers, that is, equal but different. Each person has a unique perspective to 'bring to the table', as well as whatever expertise and lived experience they have of the subject being discussed. This is especially the case when the co-facilitation involves a member of staff and a service user or family member/carer.

Ideally, co-facilitation would span the entire process of helping people learn, covering all aspects of the before, during and after that are outlined in Section 3 of this Manual.

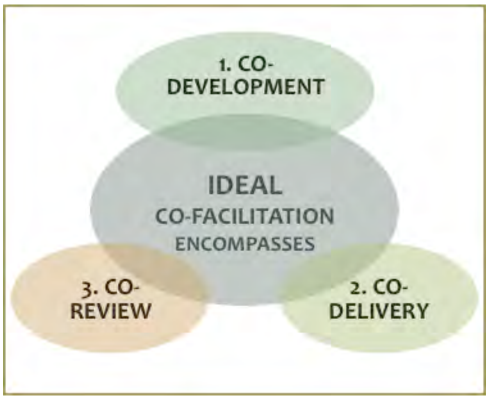


Figure 13: Three dimensions of co-facilitation

Certainly, when co-facilitation involves people who don't normally work together, the ideal approach is for both parties to be involved in the development of the material before the session, in the delivery of the material or session, and in the review and evaluation of the material/process after the session (see Figure 13). Where both parties are involved in all three dimensions, the learning for them as well as for participants is likely to be improved as the planning will be more robust, the delivery will be more integrated and the review will be more useful.

Joint **planning and development** is especially valuable in helping to surface and clarify assumptions about what is important / what is needed, and is good too for allowing people to check that the language they use is appropriate. Of course, planning and developing the material together also ensures that the content reflects more than one perspective. This is especially important when the co-facilitators are 'representing different constituencies', such as service users or family members of service users and staff/health and social care professionals.

Good **co-delivery** is about more than simply taking turns to present different parts of the material. It is about sharing responsibility for making it as easy as possible for people to learn. It includes supporting each other, and being clear on each other's role at different times, as well as flexing and adapting to make things feel seamless for the learners.

After the event, the facilitators will want some assurance that their collaborative work has been good and of benefit, so it makes sense that both would be involved in **co-reviewing** their work together and in evaluating the work with participants. If there are changes to be made as a result of the review/evaluation, it is good practice for both facilitators to be involved in deciding upon these changes.

However, co-facilitation is not always possible in this ideal three-part way. For example, programmes or interventions for national application may be designed centrally by one group of people and delivered locally by a multitude of co-facilitators who were not involved in the design stage. Or evaluation might take place a high level, such as when an organisation wants to see the outcome of a suite of learning interventions, which can make it difficult to see the impact of just one intervention in that suite. Nonetheless, there is always some room for a degree of co-development, co-delivery and co-review to take place in most co-facilitation. One of the ways in which this can be enabled is through a thorough discussion of roles and reaching agreement on how to work together.

FACILITATING LEARNING IN GROUPS

WORKING TOGETHER - ROLES AND STYLES IN CO-FACILITATING GROUP LEARNING

It has been said already in this Section that the success of co-facilitation is largely about the relationship between the co-facilitators. Trust between the co-facilitators is a mark of good co-facilitation, especially when it is forged through common experience. Of course, relationships are generally built over time – with time, good relationships tend to deepen as the parties grow in understanding and acceptance of each other. Knight and Scott (1997) suggest that there are three stages in the development of the relationship between co-facilitators.

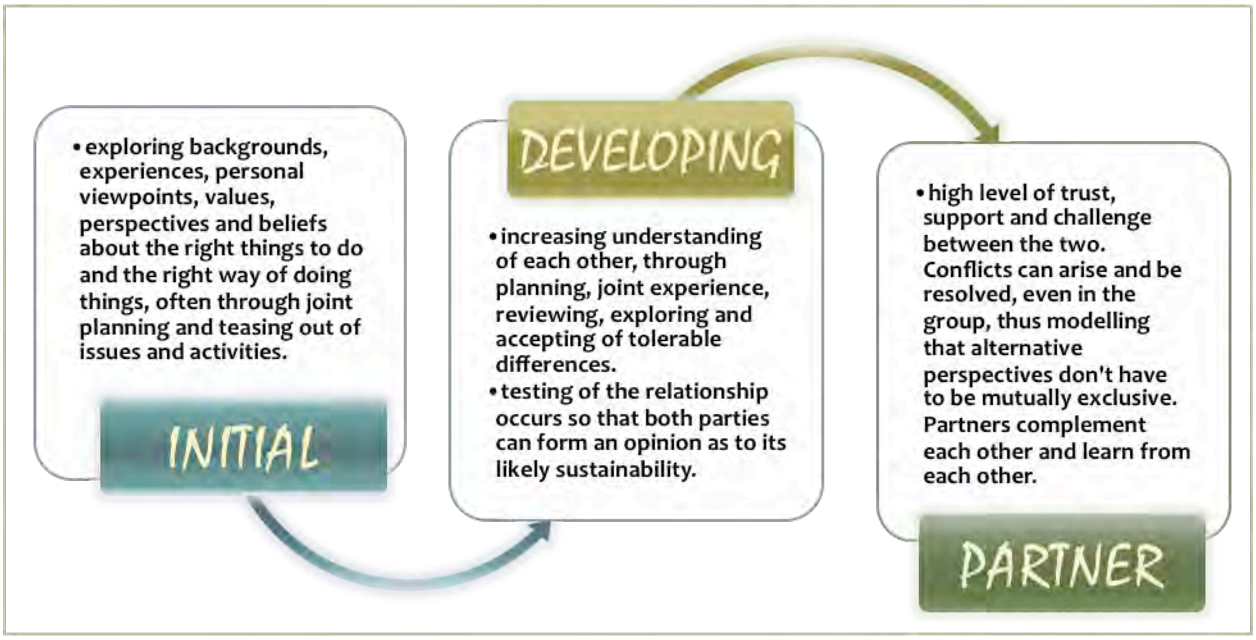


Figure 14: Three stages of evolution in co-facilitation (Knight & Scott, 1997)

In general, the younger the relationship between co-facilitators, the more communication is needed between the two facilitators to ensure understanding and to enable trust to grow. There is a lot to be discussed when starting out in co-facilitation. Obviously, discussion is needed to ensure a thorough shared understanding of the material to be covered in the session.

But, possibly even more importantly when working in a relatively new facilitation pairing, discussion is needed of the working relationship, of who will do what and how it will be done. Discussion is usually also needed regarding the 'contract' that the two facilitators have with each other, a contract that is best when based on respect for each other's contribution. This respect may need to be clarified in concrete terms so that new facilitators are aware of how respect will be put into effect in real terms so as to avoid irritating each other (see text box for examples).

When starting out with a new potential facilitation partner, here are some questions that you might want to explore:

CO-FACILITATION 'IRRITANTS'

- Not agreeing when or how the 'other' facilitator may intervene
- Facilitators contradicting each other
- Repeated time overruns (thus 'eating in' on each other's time)
- Not agreeing where to sit (especially when not leading)
- Not making time together for preparation and/or for 'clean-up'/follow up
- Competing (however subtly!) for the affection or esteem of the participants
- One facilitator is left with all the set-up and follow-up jobs

- **My preferred way of starting with a group is…**
- **When someone talks too much, I like to…**
- **When the group is silent, I…**
- **When an individual group member is silent for a long time, I …**
- **If someone comes in late, I like to handle this by…**
- **When co-facilitating, I like to sit (where) …**
- **When co-facilitating, my preferred role when not leading is…**
- **If two group members disagree with each other, I …**
- **If someone in the group gets very upset, I like to …**
- **When I find myself running out of time or when I'm behind schedule, I…**
- **Immediately after a session, I like to…**
- **Three words that would best describe my general style when I'm working with a group are…**
- **The thing that makes me most uncomfortable in groups like this is…**
- **One aspect of my facilitation that I'm not too sure about is…**
- **My understanding of confidentiality is…**
- **I would break confidentiality if…**

These questions can help you both to clarify your facilitation style and to explore some of the aspects of working together that can be taken for granted. Of course, there may be other things too that are of concern to you in setting out on co-facilitation – just because they are not listed above does not mean you cannot raise these things with your co-facilitator prior to working together.

There are many roles, tasks and behaviours that are associated with good facilitation, whether this facilitation is by one or more facilitators. Many of these have been discussed at various points above in Section 3. They are summarised below too as a reminder of the kinds of things that you might want to discuss before the session with you co-facilitator so that you are both clear on the ***'who-does-what'*** of facilitating together.

KEEPING THE GROUP 'ON TASK'

- **Clarifying objectives, hopes and expectations**
- **Ensuring that discussions remain focused on the issue and 'correcting' things if they seem to go off course**
- **Time keeping (session-by-session)**
- **Parking issues which seem a little off-point**
- **Adapting content to flex around overruns, etc.**
- **Structuring tasks and activities – ensuring participants are clear on what they are doing at a given time**
- **Checking with the group that they understand and can make sense of the material**
- **Setting up the room and clearing up afterwards**

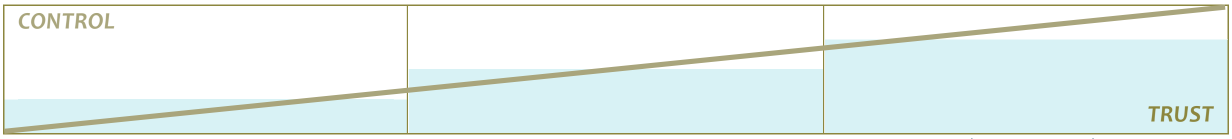
ENSURING PRODUCTIVE RELATIONSHIPS

- **Setting ground-rules with the group**
- **Ensuring everyone is getting a chance to speak**
- **Intervening if one person is dominant**
- **Raising awareness of resistance or defensiveness**
- **Caring for/minding the individuals and the group (e.g. checking that the group is gelling, asking people if they're OK, etc.)**
- **Minding each other**
- **Managing any strong emotion that might come up in individuals or between individuals**
- **Jointly debriefing and reviewing how things went**

This is not an exhaustive list of all that is entailed in facilitation/co-facilitation. But there is very good reason to believe, largely derived from the "lived experience" of co-facilitators in health and other settings, that clarifying these roles in advance of working together can really help to ensure things go smoothly. Co-facilitators can agree whatever distribution of roles that best suits their levels of comfort and competence. But it is good practice to rotate the roles from time to time, if only to ensure that co-facilitators have an opportunity to move outside their comfort zone and stretch their facilitation competence.

FACILITATING LEARNING IN GROUPS

As well as agreeing who will do what, when working with a new partner or team, it is also really useful to discuss ***how*** things will be done. Different facilitators will have different approaches and styles. John Heron, one of the fathers of facilitation theory, classified three broad dimensions of facilitation style depending on the balance of trust and control between the facilitator and the group.



'HIERARCHICAL'	'CO-OPERATIVE'	'AUTONOMOUS'
Characterised by a low level of trust in the group and a high level of facilitator management	Characterised by a moderate level of trust in the group and a shared responsibility for success	Characterised by a high level of trust in the group and the group taking responsibility for success

Figure 15: Facilitator style - a continuum (based on the work of Heron, 1999)

There is no 'one right style'. In theory, the choice of style would be based on the needs of the group – for example, with a group that is established and already well-functioning, the autonomous style might be best. In a new group, the hierarchical style is probably safer and more appropriate.

In reality, most facilitators tend to have a preferred facilitation style, and they may be blind to the possibility of working in a different way with groups. Style can be important as, depending on which style is chosen or used, the facilitator's way of intervening can vary quite a bit. There are many right ways of facilitating, and style can often be dictated by variables such as the time available as well as the level of group development. Here are some examples of how different styles can lead to different ways of intervening by the facilitator:

	'HIERARCHICAL'	'CO-OPERATIVE'	'AUTONOMOUS'
MANAGING TIME	The facilitator is responsible for managing the time and makes the decisions about when to move on, when to delay.	The facilitator shares the responsibility for time management with the group ("if we spend more time here, we'll have to cut back on the lunch-break by 10 minutes: is this what you want?").	The facilitator gives responsibility for managing the time to group, often by simply raising awareness of it and leaving it to the group to decide what to do ("can I just bring your attention here to the time and where we are in our agenda…?").
MANAGING EMOTIONS	The facilitator decides how to handle high levels of emotion in the group (e.g. "things are getting a bit heated here – maybe we'll take a break").	The facilitator shares responsibility for managing the high emotion ("I'm noticing that things are getting a bit heated… are you OK to deal with this now?").	The group is given responsibility for managing high levels of emotion (the facilitator may say nothing or may simply draw attention to it "I'm noticing that emotions are running a bit high here").
STRUCTURING ACTIVITIES	The facilitator structures the activities for the group ("I want you to split into 3 groups and consider these questions for 20 minutes").	The facilitator and the group together decide how to structure activities ("so, how do you want to progress this issue?").	The group decides how to structure activities (a group member says "OK, so we should probably break into smaller groups and each look at a different part for 15 minutes").
CARING AND VALUING	The facilitator is responsible for (e.g.) ensuring all get a chance to speak and for validating interventions.	The group is explicitly asked to make sure everyone is engaged and to build on each other's ideas.	The group is responsible for looking after each of its members.

Figure 16: Different ways of intervening, according to facilitator style

Trust is, of course, a key part of a well-functioning relationship. Trust develops when two people work together and it can grow slowly or quickly, depending on the make-up of the two individuals and depending on the circumstances of their work together. In general terms, the **Commitment-Openness-Knowledge-Empathy** model that was suggested for trust-building with a group (see Section 3.2) has relevance here too:

Commitment	Trust is likely to build more quickly between co-facilitators when they are both committed to the belief that helping people learn and develop in groups is a good thing, in and of itself. Trust is also likely to build when co-facilitators share a conviction that it is worth learning about whatever is the subject-matter of the workshop. Finally, trust is likely to grow more quickly when both parties are committed to co-facilitation, that is, when they share a conviction that co-facilitation is better for the learners.
Openness	In general terms, trust builds more quickly when there is a degree of openness between the co-facilitators. This openness can include disclosing or owning up to fears and anxieties or any other difficulties that might get in the way of the work. Openness also includes receptivity to feedback, to hearing how it is for the other person to work with us.
Knowledge	Trust grows more quickly when we feel that we are working with competent or knowledgeable people. So, co-facilitators should ensure that they have done whatever 'homework' or knowledge acquisition is required of them before volunteering to co-facilitate on a subject.
Empathy	A major component of trust is that sense that the other person can see things from our perspective and is willing to 'walk in our shoes'. Empathy and connection can also be built by exploring the common ground, the experiences and aspects of ourselves that unite us rather than divide us.

CO-REVIEWING YOUR CO-FACILITATION

One of the most useful aspects of co-facilitation is that, after the event, you and your co-facilitator can together review how things went. Once again, two heads are better than one. Because you have another person to reflect and look back with, you can avoid some of the pitfalls that are often associated with solo delivery and solo review, pitfalls such as blind spots or excessive self-doubt. Co-reviewing a session or an intervention means that your co-facilitator can give you their perspective on things so you have the benefit of their view as well as your own experience. This is especially useful if something happens in the session that you can't really understand as you now have the benefit of a second set of eyes and ears to help you to make sense of it. You and your co-facilitator can also give each other specific, meaningful and evidence-based feedback on how things went.

There are many ways in which you can co-review. This can take the form of a relatively 'quick-and-dirty' debrief immediately after the session, right through to an in-depth joint reflection on practice. Sometimes, it can be good to just start with each facilitator giving their assessment of "on a scale of 1-10, how did things go in this session?". And, of course, the mini learning cycle mentioned in Section 3 and shown here is also a good way of looking together at what happened, how it went, what conclusions can be drawn, and what might be done differently in future.

Appendix 3 contains some good review and reflection questions for facilitators and co-facilitators. These questions help the co-facilitators to reflect on overall 'performance' and they also help to identify any areas where further development may be appropriate.

Other 'top tips' about co-facilitation include:

- *Ensure that there is as much parity as possible between the facilitators, that there is a sharing of different aspects of the different aspects of the co-facilitation work, including the preparatory/set-up aspects and the follow-up aspects.*
- *If you regularly work with the same co-facilitator, take turns in leading at different times.*
- *If the co-facilitation involves a staff member and a service user or family carer, give particular attention to which facilitator(s) leads on the introductions and general welcome that is given to participants at the outset as this can often give a subtle but clear message about who 'owns' the intervention.*
- *Take responsibility for your own ability on the day. If you are unwell or having a bad day, let your co-facilitator know so that s/he can take whatever steps are appropriate to compensate. The possibility of 'a bad day' should be discussed in advance (this is reminiscent of the last of the 7Ps of the planning process which refers to risk management - see Section 3.1).*
- *It is very likely that you and you co-facilitator will have different energy levels and degrees of resilience. Check in with each other and offer support on a regular basis, such as 'how are you doing?', 'how are your energy levels?', 'that went really well', 'do you need me to do anything in the next exercise?', etc..*
- *Clarify the role of the 'other' facilitator, i.e. the facilitator who is not leading a particular session – if not leading, does this mean they can 'switch off'? Leave the room? Are they supposed to support in some way (e.g. acting as scribe?). Or are they supposed to switch their attention to something else, such as observing the group, checking that people are getting a chance to participate, watching for disengagement, etc.*
- *Try to work with the same co-facilitator over a period of time – deeper trust and a strong 'feel' for each other's way of working will inevitably develop as you work together more.*
- *Co-facilitation has one further advantage over facilitating alone, and that is that it offers great opportunity for camaraderie and craic – these are what often sustain people when they are working with groups and people to try to bring about change. Make sure you find time to have a bit of 'down-time' with your co-facilitator so that you can avail of this opportunity!*

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APPENDICES

Appendix 1 – DOCUMENT TEMPLATES

Appendix 1.1 – SAMPLE POSTER

Appendix 1.2 – SAMPLE SIGN-IN / REGISTRATION FORM

Appendix 1.3 - EVALUATION AND FEEDBACK – SAMPLE FORM FOR PARTICIPANTS

Appendix 1.4 – SAMPLE CERTIFICATE OF ATTENDANCE

Appendix 2 – GUIDE TO SETTING UP ROLE-PLAYING ACTIVITIES

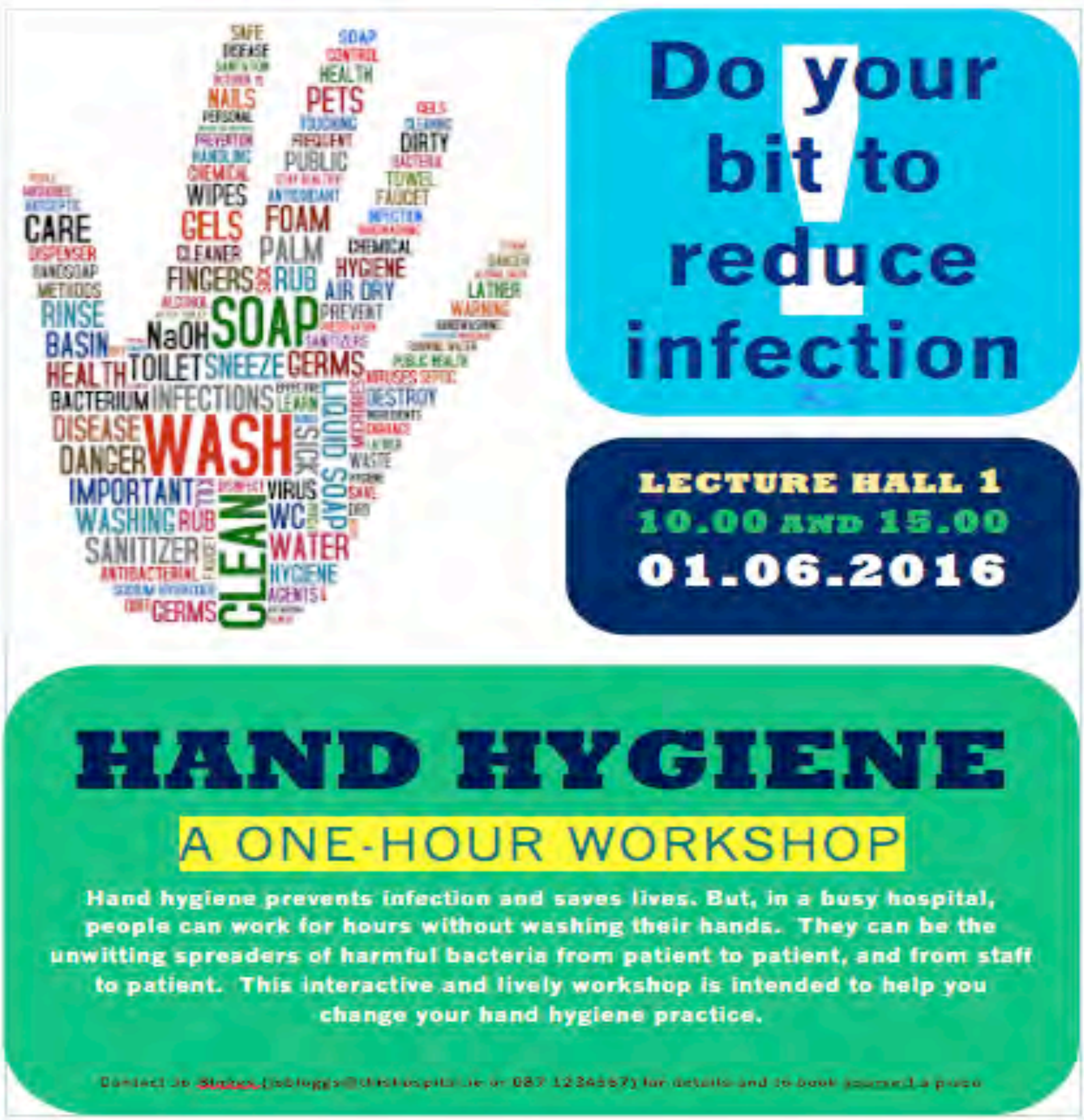
Appendix 3 - REVIEW AND REFLECTION – QUESTIONS FOR FACILITATORS

APPENDIX 1 – DOCUMENT TEMPLATES

Appendix 1.1 – SAMPLE POSTER

The following mock-upped poster was created using Microsoft Word. Start by creating a new document from one of the built-in MS Word templates (File/New from template). Depending on which version of MS Word you are using, you will have a choice of templates available to you. Simply choose the template you like best by clicking/double-clicking on it (different PCs are set up to respond differently so some will need a click and some a double-click). Then overwrite the Latin gobbledegook in the template with the details of your own poster and you will have a professional-looking poster to display on notice boards, etc. or to email to all staff. Don't forget, you can insert your own photographs or googled images too.

Notice that the poster is eye-catching, tells people the outcome it is intending to lead to (reduced infections), as well as giving all the relevant details of when, where, why and who to contact.



Appendix 1.2 – SAMPLE SIGN-IN / REGISTRATION FORM

PARTICIPANT SIGN-IN/REGISTRATION SHEET

Programme Title:

Date:

Venue:

Your Name (please print)	**Where You Work**	**Phone Number / Email**	**Professional Registration Number** (if relevant)

Appendix 1.3 - EVALUATION AND FEEDBACK – SAMPLE FORM FOR PARTICIPANTS

taken from Hogan (2003)

1. What were the most useful things today?

2. What were the least useful things today?

3. If you found it difficult to participate today, please give your reasons and suggestions as to how the situation could be improved

4. If you were to have your time here again, what would you want more of…?

5. If you were to have your time here again, what would you want less of…?

6. Any feedback or suggestions about the way it was facilitated…?

7. Please add any other comments you would like to make.

Thank you!

Appendix 1.4 – SAMPLE CERTIFICATE OF ATTENDANCE

<insert logo – if available>

< WORKSHOP PROVIDER/CO-ORDINATOR NAME >

<PROGRAMME TITLE>

<recognised approval, e.g. 5 NMBI CEUs>

This is to certify that

<Participant Name>

Attended the above workshop on <insert date >

<Facilitator Name>

<Facilitator Title>

<insert logo – if available>

APPENDIX 2 – GUIDE TO SETTING UP ROLE-PLAYING ACTIVITIES

Role-playing takes place between two or more people, who act out roles to explore how they might behave in a particular scenario. For example, if the scenario was about managing a complaint from a service user, two 'actors' would be required, one to act the part of the service user and the other to act the part of the person who is trying to deal with their anger.

> **"The great advantage of this type of experiential learning is that it helps participants to *experience* a situation rather than just discuss it in the abstract."**
>
> *Katz et al (2004) Foundations in Palliative Care Facilitator's Manual*

In this way, role-plays are very useful for helping people to prepare for unfamiliar, irregular or difficult situations. For example, they can be used to help people to practice interviews, **presentations**, or they can be give people a chance to experience how they might deal with emotionally difficult conversations, such as **resolving conflict**.

Role-plays are often based on a particular scenario or case study which sets out – in brief - the context of the situation and tells people what roles they will play. It is not usual to provide people with a script as the learning is often in people hearing what they would themselves say in the given situation, rather than in learning 'their lines'. By acting scenarios out, people can explore how they are likely to respond to different approaches; and they (and the group) can get a feel for approaches that are likely to work, and for those that might be counter-productive. They can also get a sense of what other people are likely to be thinking and feeling in the situation.

Also, role-plays allow people to gain experience in a low risk setting and so build their confidence up for handling the situation in real life. Of course, 'low risk' is relative: for some people, the possibility that they might make a fool of themselves in front of their peers by getting the role-play wrong can be a real barrier to their participation in role-plays.

It is relatively straightforward to set up and run a role-playing session. It will help to follow the five steps below.

Step 1: Identify the Situation

If people don't already have a specific scenario in mind, you can start the process by introducing the problem to the group (for example, "dealing with relatives who want more for their loved one [a service user]") and then inviting open discussion to uncover all of the relevant issues. This will help people to start thinking about the problem before the role-play begins. You can then invite someone to narrow this down into a possible single transaction ("OK, so it's a Thursday morning, rounds are in full swing, the ward is busy, and a husband arrives in to see his wife who has pneumonia. He finds his wife looking very pale, lying very listlessly in bed, apparently not even lifted by his arrival…").

Step 2: Add a Few Relevant Details and Clarify Purpose

Next, set up a scenario in enough detail for it to feel "real." In the example just given, what other salient facts are needed? (For example, the wife's age, how long ago she was admitted, any other complicating conditions, the husband's general understanding of health and health care, the husband's own health, etc.).

At this point, it is also really important to remind everyone about the problem that you're trying to work through, and that they know what you want to achieve by the end of the session. Again, in the above example, it might be useful to say something like "so, on the one hand, we're trying to understand more about how people (relatives) might react when they walk into hospital and get a fright by the appearance of their loved one and how they might then engage with staff. On the other hand, we're trying to see how a member of staff might react/respond when they encounter a patient's spouse who is frightened and agitated and becoming more demanding…".

Step 3: Assign Roles, Arrange the Room and Clarify Role of Observers
Once you've set the scene, clarify the various fictional characters involved in the scenario. Once you've identified these roles, invite people to volunteer for these fictional roles. Don't be surprised if this is met by silence or even groans! You may have to offer encouragement here and perhaps assure people that they will be safe, that you'll be asking others too to take part in role-plays, etc. Once people have volunteered to play the different roles, give them a little time, perhaps with the help of one or two other members of the group, to use their imagination to put themselves inside the minds of the people that they're representing. This involves trying to understand their perspectives, goals, motivations, and feelings when they enter the situation.

Give the actors an opportunity to lay out the room in the way they think would be appropriate – anything which helps them be 'in role' and make the scenario as realistic as possible will help make for a better role-play.

Clarify the ground rules for the observers and clarify whether they will have an opportunity to give feedback at the end of the role-play. Katz et al (2004) suggest that it can be useful for observers to make notes during the role-play (on a pre-prepared page handed out to them) on questions such as:

- *What helpful behaviour did you notice?*
- *What causes the situation to develop as it does?*
- *What alternatives could you suggest?*
- *Are participants missing chances or closing down possibilities by the way they communicate?*
- *What specific behaviour or statements make things better? Worse?*

Step 4: Act Out the Scenario
Each person can then assume their role, and act out the situation, trying different approaches where necessary.

It can be useful if the scenarios build up in intensity. For instance, if the aim of your role-play is to practice a performance meeting, the first scenario might be of a good or straightforward meeting, and, through a series of scenarios, could become increasingly hostile and difficult. You could then test and practice different approaches for handling situations, so that you can give participants experience in handling them.

Step 5: Discuss What You Have Learned
At the end of each role-play, invite the actors to 'shake off' their personas and resume their proper identity. This is best done by inviting the actors to stand, shake themselves down, brush off the role by flicking their shoulders or running their hands down their arms and legs. You will probably have to model this to them! Check in with them, especially if the role-play involved dealing with a difficult subject. Remember, it can be just as affecting to play the 'other person' (the husband in the given example) as well as the 'main character' (the member of staff in our example).

FACILITATING LEARNING IN GROUPS

When you finish the role-play, discuss what you've learned, so that the people involved and the wider group can learn from the experience. You can use the '**what? – so what? – now what?**' cycle described earlier (Section 3) to guide this discussion.

MAKING ROLE-PLAYS SAFER FOR PEOPLE

As many facilitators discover, role-plays can be a challenge. Here are some tips that can make things easier for people.

1. **Get the whole group to quickly generate some pointers** for those who are about to engage in the role-play. This helps to engage those who are not directly involved in the acting, and it gives the actors a strong reminder of how to do it well (whatever it is that they are acting). For example, in the scenario mentioned earlier of the distressed husband making demands of staff, it would be useful to get the group to precede the acting by generating their "five top tips for communicating with or engaging with angry or distressed relatives". Give them just five minutes in small buzz groups and then note their answers down on a flipchart in front of the full group. Thus, the role-play actors have a visible 'crib sheet' to help them act out their role.
2. **Start slowly**. If this is the first time this group has engaged in role-play, allow enough time to start slowly, to let people ask questions, voice concerns, etc. You will also need to offer appropriate reassurance and remind them that the purpose is not to judge people but to give people a first-hand opportunity to try something out 'offline'.
3. **Don't force people**. There is very little point in forcing people to take part in role-plays, especially role-plays that are carried out in front of others. People who are simply complying will probably not do well. On the other hand, you might find that there are lots of reluctant or resistant participants in the room and you do want to put a little pressure on them to take part. So you cannot just offer an opt-out clause to begin with as you might end up with no-one. So you need to hold your nerve a bit – let people know that you will not force them but that you are really hoping that they do 'have a go' as there is such rich learning to be had in role-playing. Stay silent for a minute or two after asking for volunteers – silence itself can often pressurise people into volunteering!
4. **Manage the feedback** - your own feedback and that of the other members of the group (the 'observers'). Ask the role-play actors what kind of feedback they would like from the observers and then use this to guide the feedback that is given. For example, the person playing the 'main character' might just want feedback on whether or not they blushed or stammered or gave any observable clue as to their feeling state. The person playing the 'other part' may want feedback on whether or not they were clear in their communication, whether they were credible enough in their portrayal of what this other person might do in the situation.

   Start the feedback by asking the actors to talk about how they felt about themselves in their role and how they felt about the responses from the other person in the scenario. Encourage them to identify what they felt worked well. Encourage them too to reflect on and speak about the emotions they experienced during the role-play as this is often the richest ground for learning.

   Another way in which you can contain feedback within an appropriate boundary is to ask people to stick to what they saw or heard only (i.e. what was observable) rather to make general comments on people's style or personality or assumed intentions.

A good rule-of-thumb which is useful in feedback is to think of the positive-negative-positive balance, whereby you start with saying something positive, then say anything that was perhaps not so good, then finish which something else that is positive.

Finally, if the role-play does not go well, help the actors by gently asking them what it was that they intended to say or convey – this can remind them of what they were trying to do and it means you can check whether the intention was appropriate in the circumstance. Separating the intention from the action makes it easier for people to see how things might be improved too.

5. **Work in simultaneous small groups**. This is often the safest way of encouraging people to participate in role-plays, as it avoids the kind of 'shop window' setting of a few people acting in front of all their peers. If the role-play involves two main roles, the simplest way of doing things is to break the large group into threes. Each group of three will be working at the same time and in the same way. Each of the three people in the trios will rotate through the three roles (2 x actors and 1 x observer), taking a different role each time so that everyone has an opportunity to experience all three.

   Note, however, that this way of working can feel a little manic as there will be a lot happening in the room as the trios/small groups work simultaneously. So, you need a room that is big enough to accommodate small groups working in this way. And, as the facilitator, you need to be able to move around, to dip in and out of the different groups as well as be able to take a helicopter view of the whole room to ensure that all the groups are working well.

APPENDIX 3 – REVIEW AND REFLECTION – QUESTIONS FOR FACILITATORS

The following questions are suggested to help you reflect on your facilitation practice. The questions are for individual facilitators and those working as co-facilitators, which is why they are phased "I" and "we".

- **What was I/were we trying to achieve today?**
- **What change am I/are we hoping to bring about with this intervention/session/workshop?**
- **What did I/we do today to try to make this change happen?**

- **How did it go? What worked well?**
- **Overall, do I/we think it (the intervention) was good?**
- **Did the participants think it was good?**
- **What words summarise my/our feelings about the intervention now?**

- **What didn't go so well today…?**
- **What's my/our understanding or best guess as to why that didn't go so well…?**
- **What do I/we need to do more of or less of in the future in order to make things even better for participants?**

- **So, what changes would I/we make if I/we were doing it again in the future?**
- **How would I/we know if these changes were worthwhile?**

- **Arising from the answers to these questions, does it seem as if I/we have any further development needs regarding my/our facilitation of learning in groups?**
- **If so, what are these needs?**
- **What first step will I take to ensuring these development needs are met?**

SPECIFICALLY FOR CO-FACILITATORS

- **How did you find your work together today?**
- **Thinking about how you worked together both before and during the session, what went well?**
- **Anything about your collaboration that didn't go so well?**
- **Is there any aspect of your input that you would especially like feedback on from your co-facilitator?**
- **Is there anything you would like to ask your facilitator to do more of, or less of?**
- **Name one aspect of your co-facilitator's work that you really liked.**

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