

ON SITE FACILITATION TIPS

If you are doing a Club Visioning on site, the following information will be helpful to your team.

During The Session

The following guidelines are adapted from The Facilitator's Fieldbook by Thomas Justice and David W. Jamieson. This is a great checklist to review before each session begins.

- Smile and greet participants as they enter the space.
- Summarize key points before moving on to a new subject.
- Be aware of time; however do not repeatedly check your watch.
- Listen intently. Be a role model for listening, often paraphrasing and “mirroring” what was said.
- Maintain good eye contact and stay connected to the group and each of its members.
- Use people's names. (Tent cards with names in large letters are used at the Club Visioning)
- Acknowledge and respect diverse views.
- Protect each and every idea offered. Do not allow ideas to be attacked.
- Keep track of who talks and who does not, encouraging balanced participation.
- Organize, connect, and summarize to achieve closure and a sense of completion.
- Keep track of unanswered questions throughout the session and brainstorm available resources that might help answer them

Facilitator Responsibilities

Additionally, it is your responsibility to foster a sense of understanding and inclusion. Follow these guidelines and encourage the participants to do the same. This information is taken from the Rotary International Assembly Facilitator Handbook.

- Speak slowly and clearly
- Avoid colloquialisms
- Avoid sentences or questions with negatives (For example, instead of saying: “You have not had your meeting yet today, have you?” Say instead: “Have you had your meeting today?”)
- Re-phrase if your comments are not understood
- Provide specific examples
- Avoid interrupting
- Avoid jokes
- Be aware of gender sensitivity

Body Language/Voice

When you are facilitating, how you use your body and voice during conversation becomes just as important as the questions you ask. Consider the following aspects of nonverbal communication. This information is taken from the Rotary International Assembly Facilitator Handbook.

- **Voice Quality:** Tone, inflection, pace, and volume affect the meaning of the words you use. If you're excited, nervous, or unengaged, your voice can convey this.
- **Facial Expressions:** Your face may express disagreement, confusion, interest, or concern.
- **Gestures:** Lively, animated gestures can capture participants' attention, make the material more interesting, and facilitate learning. Nodding reinforces what participants are saying and indicates that you are listening but does not always imply agreement. Remember that gestures may have a different connotation in different cultures so try to be respectful and considerate.
- **Silence:** At the beginning of a session, silence may be an effective way of conveying that it's time to start. Being silent after asking a question lets participants think about their response.
- **Eye Contact:** Eye contact can regulate the flow of communication and control who speaks. It also affects how you're perceived by participants. The use of eye contact varies from culture to culture.

VIRTUAL FACILITATION TIPS

If you are doing a Club Visioning on a virtual venue, the following information will be helpful to your team.

Before the Session

Equipment:

Having effective equipment on a virtual training is paramount to your success as a facilitator. You cannot do a good job if you don't have the correct equipment or if you are worrying about your equipment operating appropriately. Be sure to download Zoom on your device. It is best to use a Desktop computer or a Laptop computer. An iPad is adequate, but not optimal for all roles except Scribe and Tech Host. You need to use a computer if you are assigned one of those two rolls. Definitely not a tablet or phone for being a facilitator.

Also check to see if your device can support virtual backgrounds. The reason we want your device to support them is that IVFC will have a virtual background for you to use so you can be designated as the facilitator for the Visioning event. It indicates you are in charge.

Next, if you are going to use a head set, be sure the participants can hear you and you are able to hear the participants. Be sure to do this check with someone before you go to the Visioning event. Then test it again when you enter the Zoom event for the sound/video check.

Ask yourself: Does my device have consistent access to Wi-Fi? If it does not, then you may want to find a different place to be when you facilitate as good internet service is essential to keeping you online. When you are facilitating, choose an area of your home or office where your Wi-Fi signal is most reliable. Close all non-essential browser windows and software on your computer or device so your bandwidth is used for your Zoom platform. Sometimes having a direct connection between your computer and your modem or mobile access unit, will help you have better Wi-Fi connection such as a LAN line which looks like a large telephone connector.

Disable the Wi-Fi connection on other devices to optimize your bandwidth. Your Tech Host will run any videos and do any screen sharing of PowerPoints so do not worry about taking bandwidth for those purposes. Set your other devices to Do Not Disturb so that your session is not interrupted by text message or e-mail notifications.

It is helpful if you use more than one monitor; however, it is not essential. If you use a second monitor, keep your Zoom Platform with the webcam and Session Plan/PowerPoint on one monitor and your documents on the second monitor.

Zoom Features

Learn how to use all the major functions of the online meeting software on Zoom: camera, microphone, chat, polls, reactions, raise hand, lower hand, etc. If you do not, please begin to practice and learn these major functions.

Appearance

Look professional. It is tempting to just throw on anything because it is only a Zoom event; however, it is a matter of respect for your participants that you dress professionally. Try to wear colors that will not clash with the IVFC virtual background. Business casual or Rotary logo wear that looks professional would be appropriate. Just look well-groomed and professional.

Sit a good distance from the camera. Participants should be able to see your face, shoulders and some of your chest. When presenting virtually, it is best to be sitting, but for those who have a desk that pops up and allows you to stand, be sure the participants can see your face, shoulders and some of your chest.

Lighting is important. There should be more light in front of you than behind you. If you appear dark, move to a place where it is well-lit or get a lamp to shine on the front of you. If you appear darker on one side than the other, put a light on the floor of the darker side and aim the light at that side of your face.

Then for those of you who want to use the “touch up my appearance” feature, it creates a soft look when you use the webcam. On the Zoom platform, find the Stop Video feature which looks like a Video camera. There is a little carrot beside it that looks like this (^). Click on the carrot. Click on Video Settings. Under **My Video**, second box down is “Touch up my appearance.” Adjust the sliding bar to touch up as much as you want.

Reduce Distractions

During the Visioning event, you need to reduce any distractions. If you have a pet, put the pet in another room. If you have a spouse, let him or her know when you will be facilitating so you are not disturbed. If you have children, be sure they have someone to watch them in another room or elsewhere when you are facilitating. Also, reduce any background noise so turn your television, music, and notifications on your devices off.

Materials

Print any documents you need such as the Writing Exercise, Master Plan or Action Plan or have them open on your computer. Remember, you can hear the rustle of paper so if you can use a second monitor for your documents that would be ideal. If you need to print them, then be aware of paper rustling. Be sure to check that at tech rehearsal.

Getting Comfortable

Pour yourself a glass of water and use the facilities before you logon as you will not be able to leave the session once it starts. Be sure your chair has a good cushion so you won't be wiggling around trying to get comfortable.

Identifying Yourself on the Zoom platform

Edit your name on your Zoom platform so that you have your first and last name and the word: Facilitator. Example: Joe Smith Facilitator. Set up the virtual background that IVFC has given you electronically. This designates you as the facilitator.

Pre-check

Finally, login 30 minutes before each Visioning event for sound/video check with your Tech Host.

During the Session

Set Up

Once on the Zoom platform, turn on your camera and sound. Check how you look in the square. Be sure you have space on each side of you and a space above your head with your face, shoulders, and some of your chest showing. Check your lighting to be sure your face is lit on both sides. Check to be sure your virtual background is the IVFC virtual background. Have a copy of your virtual background saved to your desktop so if you lose it, it will be easy to retrieve. Be sure you disconnect all your other devices from your Wi-Fi. Your Tech Host will have you do a sound check. Remember to keep your video on. Mute yourself when you are not speaking and be sure to unmute when it is your turn to facilitate. Put the word “UNMUTE” at the beginning of where you are to facilitate in each section, so you don’t forget.

Setting the Stage

Remember what you do at the very beginning will set the stage for how the rest of the session will function. So, several things.

1. Ask the Tech Host to let the participants in five minutes before the start time
2. The Tech Host will ask them to rename themselves and show them how to rename
3. As the facilitators when the participants start coming in, welcome them
4. Set your view to gallery view (49 on each screen). This can be set in Settings on Zoom.
5. Open the chat box pane to see any communication by the participants
6. Begin on time. Lead tells the Tech Host when it is time to get started.

Tech Overview

The Tech Host will go over the Rules of the Zoom. During this time, the participants will practice using the Zoom features to ensure optimum participation and learning. Then the Tech Host will introduce the Club President or Club Visioning Coordinator to conduct the welcome.

Speaking

When you are facilitating, be sure you look into the camera while both speaking and listening to show you are actively engaged. Project your voice and enunciate your words so that you are easily understood. Speak slowly so everyone can understand and hear you. Maintain a strong volume throughout the session. Read your script with enthusiasm and energy. Monitor your verbal reactions such as your tone to what the participants may say when they are requested to respond.

Non-verbal Communication/Body Language

Be aware of your facial expressions, posture, and gestures to be sure they are all friendly and positive. Make really good eye contact which means you need to look into the camera on your device to establish the perception of giving eye contact to your participants. Ninety-three percent of communication is non-verbal. Words are only: 7%. Tone of Voice: 38%. Body Language: 55%. So be very aware of your non-verbal communication.

Be Engaging

Smile!!! Exhibit positive energy and enthusiasm to set the tone. When you are having fun and enjoying the experience, it is contagious to your participants. The Scribe when presenting the Summary/Synthesis will especially need to exhibit lots of energy and enthusiasm.

Practice

Practice, practice, and practice some more. You need to be very familiar with the content of the Visioning process. You put the enthusiasm in and the energy. So read over the PowerPoint or Planner script at least six times so you flow fluidly through the content. Better yet, go to your Zoom account (if you do not have one, you can get a free one), start a meeting, practice on the Zoom venue and record yourself so you can see what you look like as a facilitator.

Responses in the chat

During Extraction, the Extractor will ask participants to put their ideas in the chat. Either the Extractor or an assigned facilitator will be reading the ideas in the chat. When you read the response, you need to state the person's first name and then the response. For example: Sally says xyz. Sam says: abc. This gives the person recognition for his or her idea or thought. It also let's everyone else hear the idea so when it comes time to vote, they have heard the idea.

Ending

Start on time, stay on time, and end on time. Thank the participants for attending. Give them instructions on what to do until the second session. If voting is to be done before the second session, the Scribe will explain exactly what will happen.