**Preparing for Your Role**

**I. Facilitation – Idea Exchanges**

Facilitation is the process of guiding a meeting or discussion. Facilitators are neutral individuals who determine, guide and monitor the structure of discussions so participants have high-quality exchanges of ideas.

Your role as a facilitator is to:

* Introduce and present the topic for discussion
* Facilitate the exchange of knowledge and experience; and
* Keep the discussion focused on the learning objectives.

Controlling the rate at which discussion moves is a vital element in leading a group. When the rate is too slow, only some major points of the topic are covered in depth, while if the rate is too fast, the group does not have meaningful discussion of the topic. A good discussion leader has a sense of timing and is able to monitor the pace of discussion in firm but subtle ways.

Consider the level of experience and knowledge of the participants. Some of the participants in the group will have substantial knowledge about the topic, while others will have very little. If the majority of the participants are not well informed, you will need to provide more information to maintain meaningful discussion throughout the time allotted.

Your training materials are designed to assist you in generating meaningful discussion. You should address most of the major points of the assigned topic within the established time constraints. However, since open discussion is encouraged, other points and topics will undoubtedly be raised. Be flexible, allowing some discussion and then steer the conversation back to the topic.

To be successful, project a positive image to participants. Adult learning is influenced by the participant’s perception of the training leader's competence, credibility and enthusiasm.

Skills required:

1. Listening. The facilitator should be able to listen actively in order to hear what every participant is saying.
2. Questioning. The facilitator should be skilled at asking questions and should skillfully phrase the questions and reword as necessary to get maximum involvement.
3. Sharing. The facilitator should create a safe atmosphere in which participants are willing to share their feelings and opinions.
4. Problem Solving. When presented with a problem, the facilitator should help the group identify a solution, rather than focus on the negative.
5. Resolving Conflict. Recognize that participants will have diverse backgrounds and opinions. Conflict among participants should not be suppressed. Instead, it should be expected and dealt with constructively.
6. Using a participative style. The facilitator should be able to encourage all participants to participate in the discussion.
7. Accepting others. The facilitator should maintain an open mind and remain neutral, not criticizing the ideas and suggestions of the participants
8. Empathizing. The facilitator should be able to consider the issue from a variety of perspectives.
9. Leading. The facilitator must be able to keep the group focused and the discussion on target.
10. Time Management. The facilitator must ensure all material is equitably covered in the time allotted for the session.

**II. Characteristics of Adult Learners**

It is important for facilitators to know how people learn. Learning involves:

* Taking in information
* Processing information
* Gaining understanding or insight
* Applying what has been learned

Understanding principles of adult learning helps the facilitator fulfill his/her critical role. The purpose of adult education is to help them to learn, not to teach the participants what you want them to know. Rotary training materials are based on the principle of facilitated learning – not teaching.

Important considerations when training adult learners

1. Adult learners are usually self-directed.
2. The trainer functions as a facilitator rather than an academic instructor.
3. Learners have individual needs and learning styles.
4. Learners’ past experiences are useful in the learning process.
5. Learning activities should have some relevance to the learners’ circumstances.
6. The environment must be conducive to learning.

**III. Successful Global Training**

As the facilitator, it is your responsibility to foster cultural and linguistic considerations for all participants. Follow these guidelines yourself and encourage participants to do the same.

1. **Speak slowly and clearly.** Speak slowly and clearly without raising your voice. Be sure to pause at the end of your sentences, to give listeners time to hear and process what was said.
2. **Use visual aids**. Regional accents can affect participants’ comprehension. Use flip charts or refer to the workbook for key points or questions.
3. **Do not use colloquialisms**. Use objective descriptions instead of casual forms of the spoken word, idioms, etc. You must be very conscious of your language as you will not even realize how frequently you use idioms or colloquialisms.
4. **Avoid sentences or questions with negatives.** The person may answer with an affirmative answer, meaning that you are correct that an event has not occurred. (Ex: "You haven't had your meeting yet, have you?" Instead, ask, "Have you had your meeting today?")
5. **Re-phrase.** Rephrase or reword if your comments are not understood.
6. **Provide specific examples**. It is easier for participants to relate to theoretical concepts or statements that pertain to their own specific situations.
7. **Avoid interrupting**. Interrupting a speaker or responding before the speaker has finished can be considered quite rude.
8. **Don’t respond immediately**. It is respectful to silently consider a comment before offering an immediate response.
9. **Avoid jokes**. You may be tempted to start your sessions with a joke to ease tension. Humor differs widely from culture to culture. Be conscious and considerate of the fact that jokes do not always translate clearly.
10. **Gender sensitivity**. As a training leader, you must remain neutral and respect the differences of all cultures. Women today are involved in Rotary as members, club presidents, district governors and as trustees and board members. Avoid gender specific language.

**IV. Nonverbal Communication**

Dr. Albert Mehrabian, who spent a career in nonverbal research, wrote that seven percent (7%) of one’s perceived attitude is conveyed verbally and ninety-three percent (93%) nonverbally. Of the ninety-three percent, thirty-eight percent (38%) was attributed to vocal cues and fifty-five percent (55%) to facial cues.

It is important to note that there is no universal nonverbal language. Different gestures may mean different things in different cultures.

There are several categories of nonverbal languages.

1. **Body movement and use of space**. The training leader greeting people at the door and standing in the front of the room at the beginning of the discussion period sends a message of control without words. Some movements can distract participants. Examples of distracting movements include playing with jewelry, paper or a pen, continually adjusting glasses, touching hair, or leaning against a wall for support.   
     
   If using a flip chart, do not turn your back to participants. When referring to a visual, do so at a 45-degree angle. When possible, use a scribe.  
     
   As the space between the message sender and the receiver becomes less, the communication tends to become more personal and intense. Backing away and creating more space can have the opposite effect. For example, stand between participants to block cross talk with your body, or back away to encourage it.
2. **Voice qualities and characteristics**. The use of tone, inflection, pace and volume all have an impact on the words that that we are using. Providing variety can help convey the appropriate messages at the appropriate time.
3. **Eye contact.** From the training leader perspective, use of the eyes may help control who is speaking and who may speak next as you move around the room. The way you use your eyes may also impact the way you are perceived by the discussion participants. A study found that speakers who were judged sincere looked at the audience sixty-three percent (63%) of the time, while speakers who were judged insincere looked at the audience twenty-one (21%) of the time.
4. **Gestures**. While using gestures to emphasize various points can be effective, making too many can easily divert participant's attention away from a session's content.
5. **Silence**. A training leader, standing in front of the discussion group at the beginning of the session and saying nothing may be an effective way of conveying the message that it is time to start. You may also use silence after asking a question in order to allow discussion participants to mentally prepare a response.
6. **Facial Expression**. Using and interpreting facial expressions can aid the training leader. Frequently, facial expression will identify someone who does not agree with a statement or who does not understand what is being said. Training leaders can also use facial expressions to express interest or concern.
7. **Time/Pace**. A fast speaker will frustrate participants. Participants tend to view such speakers as anxious. Be sure to speak slowly enough for participants to follow (many of whom may be taking notes).

**I. Effective Questioning Techniques**

Asking participants questions can help to:

* Encourage analysis
* Broaden participation
* Encourage sharing
* Call attention to points that have not been considered
* Use conflict constructively
* Test the strength of a decision
* Close the discussion
* Call attention to the source of information

Facilitators can ask questions in different types of ways:

*Open-ended Questions.* Open-ended questions are designed to require thoughtful responses and cannot be answered with a single word or phrase such as “yes” or “three.” Facilitators use open-ended questions to increase participation since they stimulate thinking and encourage greater discussion.

*Closed-ended Questions.* Closed-ended questions solicit a one-word response. Typically, you would avoid asking closed-ended questions, unless you are working to clarify the group's perspectives or narrow down ideas to a workable number.

*Overhead Questions*. These questions are addressed to the entire group to encourage discussion, and allow any participant to respond. They can be used to bring out different opinions. If a lively discussion has suddenly stopped, you might revive it by asking, "What are some of the other items we could consider under this heading?" "What other remedies for this situation have you found?"

*Relay Questions*. These questions are returned to the group as in the following example: "That's a good question. How have some of the rest of you handled that problem?"

*Directed Questions*. Asked to a specific individual, directed questions initiate discussion, redirect the conversation, or draw out the participant. Be careful not to overuse this technique or the group will expect your questions and the meeting will become a question/answer session. Present the question before directing it to an individual to ensure that others in the group also consider possible responses.

*Reverse Questions*. These questions are used to suggest that the person posing the question give his or her own answer. This method calls for tact. If it is apparent that the participant has his or her own opinion, it is helpful to elicit additional comments. Even if the questioner obviously has no answer, you might want to reverse the question to encourage the participant. On the other hand, be alert to group members who fall into the habit of asking many questions on topics about which they have strong viewpoints.

*Redirected Questions*. This technique encourages further discussion and at the same time relates the question back to previous discussion. A question may also be redirected to a member known to have special knowledge. Example: A participant asks you a question and you redirect the question to another this way. “Thank you for the question. Perhaps <NAME> could respond as he/she may have some knowledge of that topic.”

*Directive Open-ended Questions.* These questions ask an individual to talk in the direction you want. The questions request expansion or further explanation on a particular subject. This technique is used when specific, focused answers are needed on an issue. Example: Listen to what the participant has to say, and then base the next question off of what they just told you. Your response could be “Tell me more” or “Help me understand that”.

Notes:

**II. Preparing Your Group Discussion Room**

Before participants arrive

* Clip your flip chart(s) on easel
* Place training materials where you want them
* Check sight lines (can you see your flip charts and signs from all seats?)
* Place business cards on the table as desired
* Pour yourself a glass of water
* Post a “questions for later” (or “parking lot”) sheet on the wall (use two sheets to protect the wall) (Painters tape is useful and respectful of the walls.)
* Note emergency exits
* Relax and stand by the room entrance to meet and welcome each participant
* Engage participants in conversation, and try to connect them to each other as they enter the room.

**Starting your session**

* Start on time - do not wait for late participants
* Introduce yourself briefly

**During your session**

* Facilitate discussion applying all best practices
* End on time - the participants need every minute of their breaks

**After your session**

* Remove your flip chart and materials
* Take chart pages off the walls
* Restore the room to the standard configuration if you have altered it for your

session

**III. Flip Chart Suggestions**

Using the flip charts successfully can enhance group discussion. You do not need to have perfect handwriting or be an artist to use flip charts successfully in your group discussion room. Here are some suggestions:

1. Print in large capital letters if you have difficulty with your handwriting.
2. Use bold, darker colors such as black, purple, green and blue to make the chart legible. Use lighter colors like yellow or pink to highlight a key concept, word or phrase. It is a best practice to use two colors on a page, but not more than three.
3. Clip your flip chart to the easel **at the top**. Do not simply rest the flip chart on the easel; it may fall down during your session.
4. Ask for assistance. Request a volunteer to help write responses on the flip chart or help post the flipchart on the wall. This delegation will free you to facilitate. Involve different people to avoid overburdening one participant.
5. Help the person you have chosen to take notes by repeating answers.
6. Put the caps on your markers after the session and bring the markers with you to the next session.
7. If you intend to write on the flip chart while it is posted on the wall, be sure to put one blank sheet under the page to prevent the ink from bleeding onto the wall.

**IV. Training Tips**

Using a variety of training techniques can dramatically improve the quality of a group discussion session. The Learning and Reference section of the RI website contains interactive training techniques that could be incorporated in your group sessions.

**VI. Managing the Discussion**

You may encounter several of the following scenarios. The following suggestions are techniques for managing your discussions, based on the experience of past training leaders.

**Neighbor discussion**

A participant starts a quiet discussion with a neighbor while the training leader is facilitating discussion among the rest of the group.

*Possible Solutions:*

* + - Walk near the talking participants.
    - Use silence and look at the participant to get his/her attention.
    - Gently ask if they need help or have a question for the group. Some people are shy about sharing a comment with the entire group unless they are called upon.
    - If the person is still not responsive, you may approach him/her after the session to ask that they be considerate of neighbors who may wish to participate in the discussion.

**One participant dominates discussion**

Each time the training leader asks a question, one participant is always the first to answer and gives his/her answer in a way that makes it appear as though his/her club is superior to other clubs.

*Possible Solutions:*

* + - Use a directed question (rather than an overhead question) to ask another participant to answer the next question.
    - Thank the participant who is monopolizing the conversation and say “Let’s hear from some others who have not participated yet.”

**Losing control of the discussion**

A participant volunteers to answer a question and then takes control of the discussion as though he/she is now instructing everyone in the room.

*Possible Solutions:*

* + - Before you call on individuals to answer a question, “queue” them in advance by saying “Let’s hear from <NAME>, then <NAME>, and then <NAME>.” That way the speaker knows two people are waiting their turn to speak.
    - Walk near the talking participant, effectively blocking the paticipant’s view of his/her audience.

**Disagreeing with the Rotary position**

A participant disagrees with the Rotary position and states that his/her way of thinking is better based on his/her experience.

*Possible Solutions:*

* + - Turn this statement to the group, by asking “Does everyone agree with this position?”
    - Recognize that there may be different approaches appropriate in different parts of the world.
    - Remind the participant that the role of the group discussion is not to change Rotary policy.

**Challenging the training leader**

A participant challenges the way the training leader presents information. He/she says "You are not clear - you must say it this way so that we understand."

*Possible Solutions:*

* + - The first time the confusion happens, say “thank you” and “Let me repeat.” Sometimes we forget to speak slowly and clearly; it is crucial to be accommodating and to make sure everyone understands.
    - If the participant is personally challenging you, you might ask the group, “Is everyone having difficulty with this concept?” or “Can anyone else help explain this concept to <NAME>?”
    - Rephrase your question or comment or ask another participant to repeat it to the group.

**Questioning the facilitator’s credentials**

A participant asks you how you were selected as a training leader and asks about your practical experience with the discussion topic.

*Possible Solutions:*

* + - Begin the first session with each group by stating that the cumulative experiences of the group are greater than your own personal experience.
    - Remind the group that you are here to facilitate the session and are not a subject matter expert on every topic.

**Disagreeing with a participant’s response**

A participant challenges the answer that was provided by a colleague.

*Possible Solutions:*

* + - If it is a matter of fact, ask the group if anyone has expert knowledge of the subject.
    - If it is a matter of opinion, recognize that opinions may vary and practices around the world are different.
    - If the correct information does not come forward, give the information if you know it or ask the staff person to get the answer.

**One participant loses interest**

One participant is visibly uninterested in the discussion (i.e. flips through the workbook, rummages in his/her bag, reorganizes materials, etc.).

*Possible Solutions:*

* + - Walk near the participant.
    - Try to make eye contact with the participant to encourage him/her to reply to a discussion question.
    - If using a flip chart, ask the participant to help and be the recorder.
    - During a small group exercise or after the session, talk to the participant privately to see if something is wrong (language issue, illness, distracted by a personal issue, etc.).

**Disruptive Technology**

Many of the participants are using phones or tablets to take notes but one participant has stopped participating in the conversation and is focused on their mobile device.

* + - Remind the entire group that the mobile devices are permitted in the discussion rooms to aid in learning, but personal business should be done during breaks.
    - Try to make eye contact with the participant to encourage him/her to reply to a discussion question.
    - Engage the participants in an activity (such as a pair-up) to refocus the attention of the entire group.

**Leaving during the session**

During the middle of a discussion, a participant asks to be excused for 30 minutes to make an important phone call.

*Possible Solutions:*

* + - Ask the participant if it is absolutely urgent that he/she leave right now, reminding him/her of the time the session will end.
    - If the participant still wishes to leave, allow it.

**One participant falls asleep**

A participant is clearly falling asleep during the session.

*Possible Solutions:*

* + - Walk near the participant.
    - Ask that person a directed question.
    - Ask the whole group to stand up and stretch.
    - Try an alternate training activity that will get the participants moving (brainstorm pair and share, etc.)

**Language difficulty**

When asked a question, the participant does not respond or indicates that he/she does not understand the question.

*Possible Solutions:*

* + - Repeat your question, speaking slowly and clearly.
    - Turn the question to the group to help the participant.
    - Write the question on a flip chart.
    - After the session ask if the participant is having difficulty and how you can help

**Questions and answers off the topic**

A participant provides answers that do not pertain to the topic at hand.

*Possible Solutions:*

* + - Offer to place the question/issue on a flip chart so that it can be addressed during the open forum.
    - Add question to the “questions for later” flip chart for review later in the session.

**Continuing to pursue an issue**

A participant continues to pursue an issue when you need to continue to another topic.

*Possible Solutions:*

* + - If the group is interested in the discussion and if you have sufficient time, it is okay to continue the discussion.
    - After a point, offer to post the issue on the “questions for later” flip chart so that it can be addressed at the end of the session, as time permits.

**Interruptions to the discussion**

One participant continually interrupts other participants who are speaking.

*Possible Solutions:*

* + - Walk near the talking participant, effectively blocking the participant’s view of his/her audience.
    - Say "Excuse me. Before you continue, may I ask <NAME> to finish with his/her point?"
    - Say “Thank you, you’ve made a number of points. May we hear now from some who have not expressed an opinion?"

**No participation from the whole group**

You ask a question and no one answers.

*Possible Solutions:*

* + - Be patient with the silence. Immediate response is not appropriate in every culture. Give participants time to think.
    - Restate or rephrase the question.
    - If one person looks like he/she has a response, but is hesitant to share, ask a directed question.
    - Say "What is your opinion of .………, <NAME>?”
    - Say "<NAME>, from your experience on this general subject, would you...?”
    - Ask the participants to quickly write their response and share in pairs.

**Too much participation**

Several participants are speaking at the same time, making it difficult to follow the conversation, or for the conversation to move on.

*Possible Solutions:*

* + - Some cross talk is good; it shows enthusiasm and interest in the subject.
    - If it gets too loud or seems to only involve a few participants, walk towards participants to block the cross talk with your body.
    - Say "Excuse me. Before you continue, may I ask if anyone has a comment on the point you have just made?"
    - “Let’s all benefit from our discussions by having one person speak at a time.”

**Expecting answers**

The group asks you to answer the questions instead of participating in the discussion.

*Possible Solutions:*

* + - When a participant asks you a specific question, try to ask the group for an answer or use a “reverse question” and ask the person who raised the question (see “Effective Questioning Techniques”).
    - Assure them that they will get all their questions answered – either from the group, from the staff representative or from you.
    - If it is a factual question and the group clearly does not know the answer, either answer the question yourself (if you have knowledge) or refer it to the staff representative.

**Incorrect information**

A number of participants have the wrong information on an issue and they are certain they are correct.

*Possible Solutions:*

* + - Ask the group if anyone has a conflicting opinion on the matter. "How many others would agree with the point just raised?"