

Communicating in a Workshop Setting: Guidelines for Facilitating

These guidelines are to help you, the workshop facilitator/coordinator, understand the learning objectives of the workshop sessions and achieve your own objectives for facilitating discussions and exercises. As a facilitator, you are tasked with monitoring and steering each session's learning process. Unlike a traditional teacher or trainer, you are not responsible for leading the group to any specific conclusions or understandings. Rather, your responsibility is to create a space for workshop participants in which they, and you, can learn from the ideas and experiences of others, disagree within a safe environment, and work together to form consensus. You will create that space through careful pre-planning of room and materials set up, and by engaging in facilitation tactics that promote mutual respect, thoughtful discussion, and an atmosphere of collaboration.

Learning Objectives

Inclusive, participatory, and horizontal leadership rests on the ability to engage in certain leadership strategies, most importantly: *communication, listening, building consensus, creating shared meaning, and developing learning partnerships*. These strategies are among those addressed in the workshop sessions. At various points during the workshop you may wish to discuss the meaning and relevance of these concepts in greater detail.

Communication: All leadership begins with effective communication. Leaders must be skilled at conveying their ideas and goals to others. Good leaders are good at observing, listening, articulating, and communicating. For this reason, the workshop sessions all emphasize strengthening communication skills. The initial sessions focus on self and personal communication skills, and the later sessions address communication within teams and between institutions.

Listening: Leaders are strengthened by listening to the perspectives and objectives of others. Listening is not confined to hearing what a supervisor, colleague, or competitor says, but includes valuing and giving credit to their suggestions and opinions. An effective listener, like an effective leader, is one who learns from what she hears.

Building Consensus: Building consensus is an important decision-making process for successful leadership. Through dialogue, individuals within groups, teams, or larger organizations come to understand the points upon which they agree. Decisions are formulated with a mutual understanding of options and possibilities.

Where differences of opinion remain, no action is taken by the group. Although at times consensus building can be frustrating and time-consuming, it leads to agreed upon decisions that everyone can support and follow.

Creating Shared Meaning: Small groups and large institutions can benefit from the creation of shared meaning. Through dialogue, consensus building, and shared experience, a core set of values and principles evolves in which everyone has to some degree participated in formulating and in which everyone has a stake. Shared meaning is an adaptive and flexible approach to goal setting that is influenced by a group's composition and the passage of time. When a group creates shared meaning, each member operates within a framework in which she shares ownership and responsibility.

Developing Learning Partnerships: The outcome of a partnership reflects the thinking and activities of its participants. An institution whose members execute directions efficiently and effectively is not a learning partnership if the participants do not question the relevance of their activities, evaluate their capacity for improvement, or share lessons they have learned. Developing a learning partnership is an inward-looking, collective-learning approach to institutional development. It involves self-awareness and self-reflection as well as group-awareness and group-reflection for the individuals carrying out the partnership's purpose and activities. Hence, a learning partnership is one in which the participants' interactions result in reflection, evaluation, and knowledge that enhances or accelerates reaching the partnership's objectives. Learning partnerships create dynamic, participatory, and highly productive working environments in which everyone gains knowledge while learning to increase their own and the partnership's capabilities.⁹

Role of the Facilitator

An effective facilitator listens and learns along with the workshop participants. Your role is to organize the meetings and guide the participants through the workshop exercises. You do not need to be an expert on leadership or know all the answers. Successful discussions will result in input from all the group members.

Directing Conversation: Sometimes you may wish to steer the group's conversation in a new direction through thoughtful inquiry. Your job is not to direct the outcome of conversations but merely to steer the direction of the discussion while keeping in mind that there are no correct or more valid opinions. In this way you can ensure that everyone contributes to the learning and knowledge sharing. A good facilitator creates a trusting, neutral environment in which everyone feels safe to express her honest opinion without being judged or attacked. This includes helping participants to feel comfortable enough to disagree with others in a thoughtful and respectful manner. Do not be concerned if there are lengthy silences between comments. These periods are moments when participants can pause for reflection and summon the confidence to speak up.

⁹ For a fuller discussion, see Peter M. Senge, Art Kleiner, Charlotte Roberts, Richard B. Ross, and Bryan J. Smith, *The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization*, New York: Currency Doubleday, 1994.

Stimulating Discussion: Throughout the handbook's sessions, questions have been posed to stimulate discussion and debate. The questions are meant only as guidelines to lead the group to explore diverse leadership themes. As long as the group is engaging in relevant and valuable discussions, you should feel free to let conversations deviate from the posed questions. Moreover, you may decide to use different methods of setting up the exercises or tactics for posing questions than are described in this handbook (for additional suggestions, see Appendix B). If you have identified individual participants who may be shy or lack the courage to speak up, you can always suggest your own opinion and ask one of them to comment on what you said. So long as you remain sensitive to the needs of the individual participants and to those of the group, are tactful and affirming, and share the responsibility of learning, you are partaking in effective facilitation.

Keeping to the Agenda: At times, a facilitator can best guide a discussion by being an effective timekeeper and reminding the group of the session's agenda. Although workshop group sizes will vary, it is almost always helpful to encourage participants to keep their comments relatively short, not letting one person or a few people monopolize the conversation. This is particularly necessary for those exercises that involve interventions or storytelling from every participant. A diplomatic way to remind participants to keep their comments relevant to the topic being discussed is to direct your suggestions and instructions to the whole group rather than singling out an individual. Also, consider encouraging participants to listen to what the others are saying and to build upon previous comments.

Sharing Responsibility: Although you are responsible for guiding each workshop session to completion, you do not need to be in charge of every activity or facilitate every discussion. Sharing responsibility can and should be part of organizing the workshop sessions. A simple step is to encourage participants to volunteer to take notes for the group, read aloud instructions or narratives from the handbook, and/or to facilitate the discussions. Reassuring a participant that she should not worry about her spelling if she is taking notes, or her pronunciation if she is reading aloud, can go a long way toward making her feel comfortable and inspiring others to volunteer.

Joining In: It is up to you whether you want to join in discussions. However, keep in mind that because you are organizing each session and are to some extent "in control," participants may give added weight to your opinions and suggestions. Therefore, it is important that you limit your interventions, and that when you do express an opinion you qualify it as your own perspective and not the *only* perspective.¹⁰

Enjoying Yourself: Remember that you are also participating in the workshop to gain knowledge and to have fun. Enjoy yourself!

¹⁰ For an excellent list of what facilitation is and is not, see "Part I: Facilitating Learning," in *In Our Own Words*, by Nancy Flowers, Bethesda: Sisterhood Is Global Institute, 1999.

Role of the Participants

Participants come to workshops for a variety of reasons, with a wide spectrum of preconceptions and expectations about what will take place. Regardless of their level of experience or professional status, the participants' role is to be both student and teacher, to learn as well as to share knowledge. Workshop sessions are most successful when participants listen attentively, ask questions, and challenge assumptions. Participants are responsible for contributing to discussions, working collaboratively in partnerships or as part of a larger team, and evaluating the process and progress of the sessions. Everyone participating in the workshop will benefit by contributing to a gracious and respectful atmosphere during the workshop.

Setting Up the Meetings

It is important that you come to the meeting sessions prepared. *Review the material* to be covered beforehand to make sure that you understand the handbook's intended objectives and your own objectives for the workshop and for each session. Determine what materials you will need and make sure you plan to have enough of everything. Sessions can take place in an office, public facility, private home, or anywhere there is *quiet and privacy*, and where participants will feel comfortable.

You may instruct participants to bring their own *pens and paper*, or you may supply them yourself. Depending on the room and supplies available where the workshops take place, you may wish to bring chalk for a chalkboard or bright marker pens for writing on a flip chart. Alternatively, bring large sheets of paper and tape or tacks to secure them to the walls. The chalk board, flip chart, or sheets of paper are useful for note-taking in front of the group members so that their ideas and concepts can be easily referred to throughout the session. Recording the discussion highlights on paper is particularly helpful because you can keep the written notes for future reference, referring back to the group's ideas in later sessions.

Among the exercises in the handbook are some in which the group is asked to break into teams to carry out an activity. If not all participants have a copy of the handbook, you may choose to make *photocopies of the instructions* for each team. Alternatively, you could write out the instructions in large block letters on a piece of paper and tack it to the wall so that everyone will see it.

Most sessions should last approximately two and a half to three hours. You may wish to supply something to *drink or a snack* to make participants feel more comfortable. Another possibility is to ask the participants themselves to volunteer to bring snacks. It is really up to you and what you think will work best. If you are unsure about what the participants would like or expect, ask them about their preference at the first session. Most importantly, *plan ahead* so that you know in advance what will be needed and how the sessions will be organized.

Some Supplies You May Need

- Pens and/or Pencils
- Paper
- Large paper for highlighting key points
- Tape or tacks
- Flip chart
- Colored markers
- Chalk
- Copies of instructions
- Clock with visible face & minute hands
- Drinks and snacks for a break
- Cups, plates, napkins

The First Workshop Session

When You Arrive

Arrive early for the first session so that you have time to make sure that the room is set up the way you want it. Check whether there is enough light, heat, and/or fresh air. See whether the seats are arranged to your satisfaction. Although it is not required, seating in a circle is often the very best way to organize a workshop discussion. A circle arrangement allows everyone an equal view of the rest of the group and the best opportunity to be seen and heard by the others.

When the Participants Arrive

When participants begin to arrive make them feel welcome. This is especially important if the participants are not already known to each other. If they do not already know you, be sure to introduce yourself and explain that you are the workshop coordinator. If there are snacks available, suggest that participants help themselves and then find a seat near someone else and introduce themselves.

Introductions: Once everyone has arrived, it is often a good idea to go around the whole group and have everyone introduce themselves formally. If the participants already know each other, you can ask them instead to state very briefly their reason for attending or their hopes for the workshop. You should participate in these initial exercises as well. The reason for doing them is to help the group members begin to become familiar with one another and comfortable speaking out.

Explanations: Begin the first session by briefing the participants on what will be discussed and learned over the course of the workshop, and the basic framework of each session (see below). You may find it helpful to describe the learning objectives discussed earlier: communication, listening, building consensus, creating shared

meaning, and developing learning partnerships. Alternatively, you may ask what these concepts mean to the group. In addition, you may choose to:

- Note that each workshop session will last approximately two and a half to three hours
- Describe a typical session format, including when there will be breaks
- Explain that volunteers will often be sought to assist with note-taking, time-keeping, reading from the handbook, and facilitating discussion, among other activities

Structure of the Sessions: The handbook sessions are divided into three sections: Developing the Self for Leadership (Part I); Communicating With Others (Part II); and Creating Learning Partnerships (Part III). The leadership sessions move from personal development to group or team development, to enhancing good leadership at an institutional level. At the beginning of each section is a brief introduction and explanation of the sessions' objectives. It may be helpful to begin the first session by reading or paraphrasing Part I's introduction. Afterwards, be sure to ask if anyone has any questions.

Framework of Each Session

Each session has the same basic structure. However, not all sessions have the exact same types of activities. Depending on its objectives, the session may include the following components:

Introductory Quote: On the page opposite each session is a quote from the introductory chapter entitled "The Building Blocks of Leadership." The quote provides insight into the theme of that particular session, and can be used both as a reference to the chapter on "The Building Blocks of Leadership" as well as a stimulus for discussion.

Session Objectives: Every session begins with bulleted objectives. These are to help participants understand the purpose behind the sessions' exercises and questions, and to help lead the discussions about biographies and stories. It is up to you whether to read the session objectives to the group at the beginning of the session, at the end, or at all.

Before You Start: In Session 1, 9, and 12 there are boxes that provide further guidance for facilitators. They offer helpful recommendations and reminders that are intended to steer facilitators through the beginning, middle, and final parts of each complete workshop.

Suggestions for Facilitation: Every session includes suggestions for facilitation that describe the session's exercise or exercises and the aim of the questions that follow. Further hints regarding methods and tactics of facilitation are located in separate boxes immediately before the text of each session. These boxes also provide references to Appendix B for additional information.

Exercise: Each session has one or two exercises in which group members participate together or in teams. The purpose of the exercises is to underscore certain leadership

and communication strategies. Depending on the composition of the workshop group and your assessment of the participants' needs, you may wish to adapt or amend the structure of the exercises. As no two workshop groups ever approach the handbook materials in the same way, it is important that you remain flexible and responsive to what works best within each group. Questions for discussion follow every exercise.

Questions for Discussion: The questions for discussion have been designed to elicit participants' ideas on specific topics. Each question builds on the previous one to guide the conversation forward. If this is the first time you have coordinated the leadership workshop, it is probably a good idea to follow the order of the questions in the handbook, at least in the earlier sessions. By the later sessions or in future workshops, you may feel that other channels of questioning or additional questions may be more productive. It is entirely up to you. Moreover, you may choose to have a volunteer facilitate a discussion, and she may have her own ideas about how best to direct the conversation. There are no right or correct questions for directing discussions, but it is important to keep the conversation lively, interesting, and beneficial.

Questions Around the Group: Questions around the group are to be addressed to all of the participants. The aim is to get a broad perspective on the variety of opinions or experiences within the group relating to the subject. Although this sort of inquiry works best if everyone participates, it is important that you explain that anyone may "pass" if she does not wish to speak. There are many reasons why a participant may not want to speak, and they should be respected. Nevertheless, if you notice that a group member rarely joins in the conversation and seems reluctant to participate in activities, you should seek her out privately to talk about it with her. Make sure she feels that her ideas are valuable and that she is gaining knowledge through the workshop experience. If she is not, try to find out why and explore whether you can better address her needs through the workshop sessions. No participant should be pressured to continue with the sessions if she feels that she is not enjoying or benefitting from them.

Group Activity: In several sessions there are group activities. These are distinct from exercises because the entire group must participate in collective decision-making as a single unit. Group activities are geared toward developing communication, listening, consensus building, negotiation, and learning partnership skills in an organizational setting. For some participants, operating as a group will be easier than working individually or in small teams. For others, group exercises will be the most challenging. During group activities the facilitator will play an important part in helping the group work collectively on the problem. Remember that others may volunteer to facilitate the discussions during group activities. If a participant is going to facilitate, you should participate in the group activity as a member.

Observations: The observations questions are meant to evoke conversation about the sessions' learning process and structure. The questions give participants the opportunity to describe how they felt during the exercises, and help the facilitator determine which types of exercise activities are most useful for the group.

Workshop Evaluation Questions: At three points during the workshop—in the first, seventh, and final sessions—there is a workshop evaluation. Three types of questions reoccur covering participants’ expectations and their opinion on the process, structure, and content of the sessions. The evaluation sections are to help you, the facilitator/ coordinator, determine what participants expect and how you and the group might go about meeting those expectations. Sometimes it may be necessary to clarify the scope of the workshop so that there is no misunderstanding about what will be covered in the sessions. It is particularly important during the evaluation process to remember that your responsibility is to listen, take notes, and try to incorporate participants’ suggestions and comments into how you coordinate future sessions. Keeping an open mind, a sense of humor, and a flexible approach to the workshop will help you and the participants benefit the most from the evaluation process.

Instructions for the Next Session: Sometimes at the end of a session there will be instructions for the next session. The “homework” is not meant to be burdensome and may be helpful in preparing participants for the following session’s exercises and discussions. Nevertheless, the option of giving the instructions is up to you. If you decide not to give the instructions, be sure to leave enough extra time at the beginning of the next session for them.

Concluding the Workshop

Depending on the group, participants may end the workshop with an informal party or some other group activity. In the ninth or tenth session, you may wish to ask the group to begin thinking about how it would like to mark the workshop’s conclusion. It is important to plan ahead so that participants leave the workshop feeling that their needs and expectations have been addressed. Before the participants leave after the final session, ask them to fill out the Workshop Evaluation Form provided at the end of the handbook. This form is very useful for adjusting and improving future workshop programs. It is helpful to explain the purpose of the form and to assure the participants that any information they provide is absolutely confidential. Remember to collect the form from all the participants before they disperse.

Leadership development is a lifetime project and participants will continue strengthening, adapting, and fine-tuning their communication skills long after the workshop has ended. Sometimes participants wish to organize a reunion or follow-up session some months later to give them a better perspective on what they have learned and how they have applied it. Often friendships form through the course of the sessions and participants welcome the opportunity to see each other again and to solidify the new connections.

The next steps are up to the participants themselves.