



Planning to facilitate a session

Before the day

a) Purpose of the session

- Are you clear about the overall purpose of this session?
- Are all participants clear about the purpose of this session?
- Are there specific outcomes identified for the session? Are they understood and agreed by all?
- Have you thought about your own biases in relation to the session's purpose?
- Do participants need any information before the session to be effective on the day?
- Is there sufficient time for this information to be absorbed?
- What outcomes or evidence is needed for this session to be regarded as successful?

b) Structure of the session

- What type of session would suit the purpose best (click here for Helpful Tips and Methods). If the session type has already been decided is it fit for purpose? If not what can you do to get the most out of it?
- Is it clear to all when the session is to start and finish? Are any breaks required?
- Is there enough time to address the purpose?
- What approaches can you use to help this group work through its purpose?

c) Setting

- Is the venue suitable for the purpose of the gathering? Consider number of people attending, temperature, lighting, seating, space and ventilation. What environmental impacts do you need to manage during your session? For example a stuffy room or uncomfortable seats may require you to introduce more breaks/movement.

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- Is the venue booked? Do participants know where it is, how to get there and where the parking is?
- Are refreshments needed?
- Are key venue details known (such as accessibility, exits, toilets, smoking areas)?
- Do you have all the tools you need? Whiteboards, paper, sticky notes, pens etc?

d) People

- Do you know who will be at the session?
- Do you know if people have specific needs i.e. mobility, dietary, communication, learning etc that will need to be taken into account?
- Are you aware of any agendas within the group?
- Are there relationship dynamics within the group that might influence behaviour (e.g. family, whanau, employer/employee, past conflict)
- How will you establish rapport with the group? A good connection will improve your ability to work with the group and achieve the desired outcomes. It is helpful to identify common values or experiences with group members through introductions and whakawhanaungatanga. It is important that you are authentic in your efforts to establish a connection.
- Do you need additional support e.g. another facilitator; someone to take notes (scribe), or an interpreter?

A note about learning

Most of the time you will be working with adults who often favour a certain way of processing information and will have a preferred learning style.

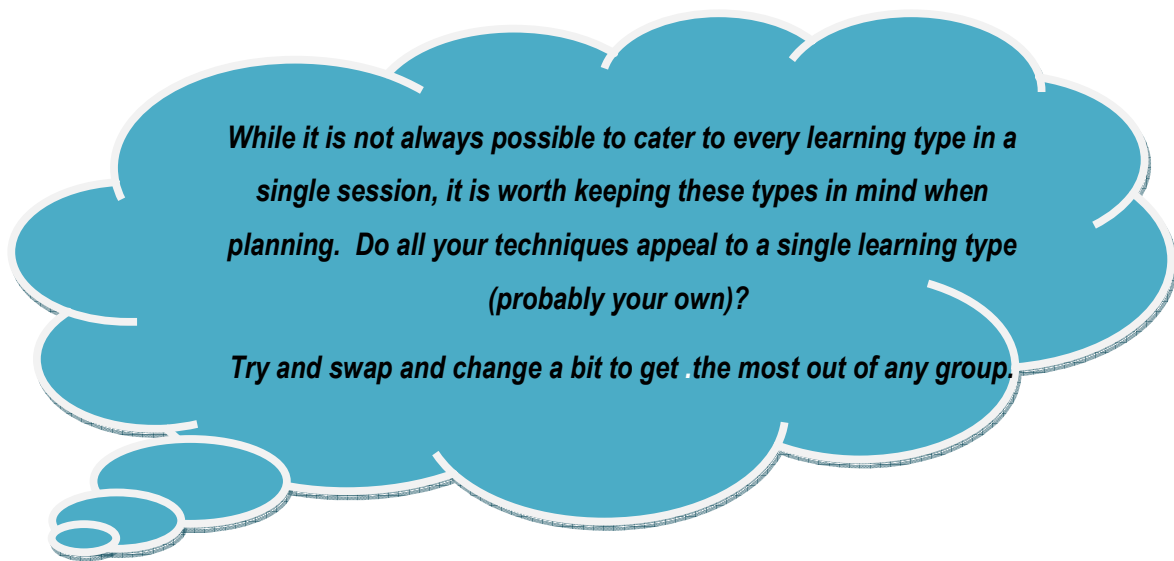
There are numerous theories relating to learning styles. One of the most common is Fleming's VARK model¹. It divides people into four learning types:

- visual learners
- auditory learners
- reading/writing-preference learners;

¹ http://en.wikipedia.org/wiki/Learning_styles

- kinaesthetic or tactile learners

Visual learners have a preference for seeing: they think in pictures and like visual aids such as overhead slides, diagrams, handouts, etc. Auditory learners best learn through listening, preferring lectures, discussions, tapes, etc. Reading/writing preference learners obviously like to read and write and will appreciate handouts and tools with which to take notes. Kinesthetic/tactile learners prefer to learn via experience, moving, touching and doing (active exploration of the world; science projects; experiments, etc.)



On the day

The way your session runs on the day will depend in part on how well the purpose or outcome is understood. However, most sessions will involve the following elements.

a) Introductions

- Introduce yourself and others with you; define your role(s).
- Allow participants to introduce themselves.
- Deal with housekeeping activities (the session timetable; where toilets are; where smoking areas are; etc).

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- An “ice-breaker” activity may be helpful to create the right atmosphere for your session. Participants need to be in a positive, focused frame of mind. There are a wide variety of methods to achieve this². Choose one that is true to your style and suits the objective of the session or the nature of the group.
- For example you could:
 - Tell a short story with some meaning that can be attributed to the purpose of the session
 - Play some suitable music, to either raise energy, calm people down or stimulate creative ideas
 - Run an introductory exercise that shows who people are beyond their working persona

b) Scene setting

- Outline or develop shared agreements or ground rules (e.g. no interrupting others)
- Confirm the session’s purpose and gauge of success
- Seek agreement on the process

c) Working through the process

- familiarize the group with the task and time; keep it focused
- Reflect on progress
- Recognise the group for its work

d) Evaluation/closure

- Reflect on the outcomes. Did the group achieve its objectives?
- Reflect on the process. What worked, what didn’t? High points? Low points?
- Agree on a path forward. What next?

Recording/documentation³

It is very important for groups to accurately record and document the content of the session, its outcomes and particularly any decisions made.

² Refer to www.businessballs.com/games.htm for ice breaker ideas

³ Rush, M (2003) Seed to Success, a guide for community conservation projects.
Department of Conservation: New Zealand

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To ensure accuracy and transparency of recording, care must be taken to:

- Write up key points where everyone can see such as on a whiteboard, flip chart or data projection of typed laptop notes
- Encourage those who cannot clearly see to move closer to the front.
- Use large, clear lettering in a thick, strong coloured marker pen.
- Use the actual words the person suggesting the idea has used. If it is necessary to summarise a long or complex comment, it is helpful to ask the person for an abbreviation with a question such as “how could we say that in one sentence?” Alternatively, you can attempt to paraphrase and ask the person for confirmation that you have got the essence of their comment. NB. If the note-taker is not the facilitator, the facilitator should check for accuracy with the group.
- Sort information as you are recording by indicating where one point relates to another.
- A mind map (see Appendix 5) may be more effective than a linear listing of ideas.
- Read through the notes to ensure that all points have been covered accurately.
- “Post” or attach flipchart pages to walls so the group can reflect on what has been covered.
- Circulate notes promptly after a meeting or workshop and emphasize action points in bold or coloured font.

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