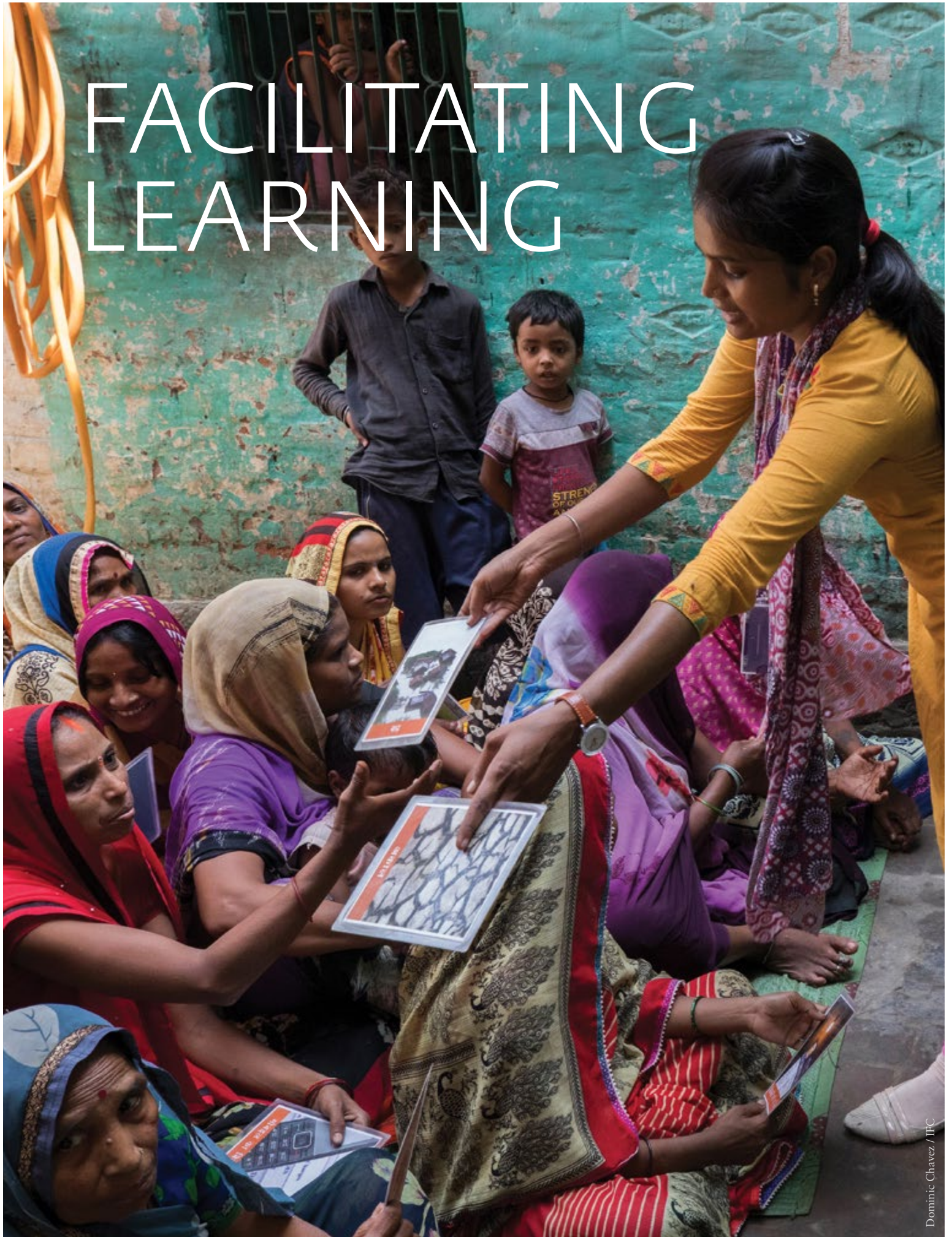


# FACILITATING LEARNING



## INTRODUCTION

*Facilitating Learning* can range in scope from coaching a small group gathered around equipment to teaching a few people in a meeting room, leading a webinar with hundreds, even thousands, of participants, and instructing a group of learners outdoors.

Many people begin their work as performance and learning professionals by *Facilitating Learning*. Facilitators often deliver learning experiences that someone else designed and developed. Therefore, to be an effective facilitator, you need to consider how the original content should be adapted for your specific audience.

If you are asked to facilitate learning that is not well designed, it is important to suggest to your client how you could improve it to better achieve desired performance results.

Competent facilitation of learning increases the likelihood that you:

- Create an environment that is conducive to learning.
- Provide an engaging learning experience for your participants.
- Keep participants on task and accountable for their learning.
- Optimize opportunities for participants to interact and practice.
- Tailor learning experiences to the specific needs of individuals and groups.
- Help participants efficiently achieve the set learning objectives.

When *Facilitating Learning* in emerging markets, culture, infrastructure, safety, and personal circumstances can challenge the effectiveness of the session. When you address these challenges directly, participants tend to engage more in class and accept, understand, remember, and use the content better after the class. As you prepare to facilitate, ask yourself the following questions:

- In what language do the participants need to hear the content? Is a translator needed?
- How will you incorporate local societal, religious, political, or legal realities and gender norms into what you say and how will you involve the participants?
- What mitigating steps will you take in the event of an unplanned interruption to class proceedings due to unreliable electricity or internet connectivity, equipment malfunction, or riot?
- What allowances may be required to accommodate:
  - low literacy/numeracy levels
  - translations
  - individual support
  - family caregiving requirements

The supporting competencies outlined here apply to *Facilitating Learning*. Not all may apply to other types of facilitation, for example, conducting strategic planning sessions, team-building sessions, mediation, and conflict resolution or helping groups solve real-world problems.

Because program participants are most often drawn from the organization of your client or program sponsor, “Demonstrate awareness of client organization,” one of the sub-competencies in the *Partnering with Clients* category, is important in *Facilitating Learning*.

For additional information on *Facilitating Learning* when conducting training in fragile and conflict-affected situations and gender-inclusive training, please refer to the FCS and gender supplements at the end of this guide.

# FACILITATING LEARNING

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# 1. Prepare to facilitate


## Importance

The impact of mastering these competencies is that you:

- Deliver a learning experience that supports desired performance outcomes and business measures.
- Deliver the learning experience based on a clear understanding of desired job performance.
- Are prepared and knowledgeable.
- Confirm that logistics are in place effectively for facilitation.






## Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

<b>1a</b>	<b>Prepare to deliver the content and activities based on the design</b>
<input type="checkbox"/>	Review design and materials for flow, clarity, and timing
<input type="checkbox"/>	Prepare to address specific psycho-emotional needs of the target audience and organization 
<input type="checkbox"/>	Incorporate feedback from previous deliveries to improve content and design
<input type="checkbox"/>	Coordinate roles and responsibilities when working with co-facilitator(s)
<input type="checkbox"/>	Develop subject matter expertise, where required, to facilitate effectively
<input type="checkbox"/>	Access additional subject matter experts, as required, to support facilitation
<input type="checkbox"/>	Rehearse challenging components of the design (for example, explanations of concepts and activities)
<input type="checkbox"/>	Prepare to use classroom media and live online technology
<input type="checkbox"/>	Adapt classroom activities as needed for live online delivery
<input type="checkbox"/>	Prepare training-of-facilitator sessions, if multiple facilitators will lead the course
<b>1b</b>	<b>Check that the learning experience supports desired performance outcomes</b>
<input type="checkbox"/>	Confirm that learning objectives support desired performance outcomes and business measures
<input type="checkbox"/>	Confirm that each learning objective is supported by relevant content and practice activities
<input type="checkbox"/>	Clarify the purpose and expected outcomes of each learning activity
<input type="checkbox"/>	Adapt learning activities to the needs of the specific participant group
<input type="checkbox"/>	Incorporate relevant job-related references, anecdotes, and examples
<input type="checkbox"/>	Confirm any changes with instructional designer to ensure integrity of the design
<input type="checkbox"/>	Ascertain appropriate attire for this training venue
<input type="checkbox"/>	Provide training in languages that participants understand and that are most appropriate for this context

## 1C Coordinate logistics

See *Designing Learning Experiences 5b* and the following

- ▶ Confirm funding for the operation of the program 
- ▶ Check that participants, their supervisors, and coaches are informed of prerequisites and requirements for pre-work
- ▶ Verify that logistics (on-site or virtual) have been arranged as required (for example, internet access, materials, support resources, webcast producer)
- ▶ Clarify instructions for setting up and closing the classroom, labs, or virtual classroom
- ▶ Verify that the learning environment (on-site or virtual) accommodates participants with disabilities
- ▶ Prepare a back-up plan for technical and logistic failures 
- ▶ Check on materials to orient participants to any required technology
- ▶ Check on catering logistics
- ▶ Maintain the safety and security of facilitators and participants as they come to, attend, and leave the program  
- ▶ Practice preventative security measures 

## Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
<b>Recommendation for modifications to learning experience design and materials</b>	Client and instructional designer are advised of modifications to the design or materials and the reasons for the changes
	Modifications reflect feedback from prior deliveries
	Modifications adapt materials and delivery for the specific participant group
	Modifications adapt materials and delivery for virtual classroom
	Modifications are confirmed with instructional designer
<b>Administrative arrangements</b>	Appropriate facilities and resources are booked and organized
	Participants and supervisors are notified of administrative arrangements
	Instructions for setting up and closing classroom and labs are documented
	Participants' materials are prepared
<b>Contingency plans</b>	Contingency plan is in place to handle any changes from the original design assumptions

## 2. Create the learning environment

### Importance


The impact of mastering these competencies is that you:

- Create a positive, comfortable, learner-centered environment.
- Share responsibility with participants for the success of the learning experience.
- Minimize the negative impact of disruptive behavior.


### Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

#### **2a Establish the physical or live online learning environment**

- Confirm all logistics prior to start of facilitation (for example, technology and software working as expected, materials and refreshments delivered, accessibility requirements met)
- Confirm that the learning environment will promote learning (for example, arranging seats to have good lines of sight, visual aids, space free of distractions)
- Create a gender-inclusive learning environment 
- Adjust the environment to accommodate needs of the participants (for example, temperature, layout, access)
- Launch the live online platform and confirm operation of functions needed
- Provide safety and security training relevant for the program as part of the introductions to the program
- Update security arrangements continuously for facilitator and participants

#### **2b Address the social and emotional needs of participants**

- Welcome participants as they enter the physical or live online learning environment
- Encourage introductions among participants
- Conduct opening activity to address participants' sense of belonging and emotional safety in the class
- Orient participants to the classroom or the live online platform
- Monitor energy or "willingness to learn" level and adapt facilitation as needed
- Acknowledge each participant, both verbally and non-verbally
- Support participants' psycho-emotional needs during the program 


#### **2c Establish responsibilities for the success of the learning experience**

- Relate learning objectives to desired performance outcomes and business results
- Clarify expectations, roles, and responsibilities for participants and facilitator(s)
- Establish ground rules for individual and group behavior
- Provide options for adjusting sequence, activities, and content as appropriate
- Encourage active participation during class

**2d Model appropriate behavior**

- ▶ Maintain warm and respectful behavior (for example, open, positive body language, smile)
- ▶ Dress to comply with dress code or unwritten norms about dress
- ▶ Use language, references, and comments appropriate to the organization and learners
- ▶ Maintain confidentiality and privacy
- ▶ Address illegal, immoral, or unethical behaviors by participants

**2e Manage disruptive or counterproductive behavior**

- ▶ Respond appropriately when participant behavior is likely to interfere with learning 
- ▶ Manage biases around control or personal preferences
- ▶ Encourage other participants to contribute to managing disruptive or counterproductive behavior
- ▶ Demonstrate respect for each individual when responding to disruptive behavior

**Key outputs and assessment criteria**

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Learning environment (classroom or virtual)	Learning environment is arranged according to specifications in facilitator materials
	Learning environment is available prior to start of facilitation
	All required training technologies are available and functioning
Formal welcome to learning	Welcome is appropriate to participants and content of learning experience
	Welcome encourages participant interaction
	Learning objectives are presented and clarified
	Welcome clearly identifies responsibilities for learning
	Ground rules established and agreed to by the group
	Welcome includes administrative information
Management of disruptive or counterproductive behavior	Response is fair and respectful
	Response aligns with the sponsor's or client's policies
	Response is appropriate and timely
	Response is effective in reducing or eliminating disruptive or counterproductive behavior



# 3. Engage participants



## Importance

The impact of mastering these competencies is that you:

- Gain and keep participant interest and motivation.
- Demonstrate that you value participants' knowledge and experience.
- Use technology to enhance the learning experience.

## Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

<b>3a</b>	<b>Deliver content and instructions</b>
<input type="checkbox"/>	Use a variety of instructional techniques to provide content (for example, demonstration, group discussion, small group activities)
<input type="checkbox"/>	Maintain appropriate balance between providing content and allowing participants to learn on their own
<input type="checkbox"/>	Use appropriate language, anecdotes, analogies, and examples to facilitate learning 
<input type="checkbox"/>	Preempt any volatile issues during training delivery 
<input type="checkbox"/>	Minimize use of jargon
<input type="checkbox"/>	Maintain an appropriate level of energy and enthusiasm
<input type="checkbox"/>	Pace learning to meet the needs of the group
<input type="checkbox"/>	Use bridges and transitions to orient participants and maintain continuity among concepts and sections
<input type="checkbox"/>	Confirm that instructions for activities are understood by participants
<input type="checkbox"/>	Provide summaries and opportunities to review at appropriate intervals
<b>3b</b>	<b>Lead group discussions</b>
<input type="checkbox"/>	Ask questions to facilitate discussions and check understanding
<input type="checkbox"/>	Draw upon participant experience, knowledge, and skill to enhance learning
<input type="checkbox"/>	Use gestures, body movements, and pauses to encourage participation
<input type="checkbox"/>	Use silence effectively to encourage participants to reflect and respond
<input type="checkbox"/>	Encourage participation from all participants
<input type="checkbox"/>	Ensure that individual participants do not dominate discussions
<input type="checkbox"/>	Respond to verbal and non-verbal cues from participants

**3c Respond to participant questions and comments**

- ▶ Encourage questions and comments from participants
- ▶ Paraphrase participant questions and comments to ensure clarity and understanding before responding
- ▶ Determine when to answer yourself, when to involve the group, and when to defer a question
- ▶ Verify that the question was answered or addressed before continuing
- ▶ Acknowledge participant contributions by providing both evaluative and non-evaluative feedback
- ▶ Adapt content or delivery in response to participant questions and comments
- ▶ Refer back to participant questions and comments, as appropriate

**3d Use differences and controversy to enhance learning**

- ▶ Encourage openness to differing points of view
- ▶ Assist participants in understanding and reconciling differing points of view
- ▶ Model conflict resolution techniques
- ▶ Maintain composure and respect for individuals and the group

**3e Optimize the use of visual aids and equipment**

- ▶ Position yourself, equipment, and visual aids to enhance learning and reduce distraction
- ▶ Use media to enhance learning, not as a crutch
- ▶ Troubleshoot equipment problems and implement backup plan as needed

**3f Use live online tools**

- ▶ Maintain technical skills required to use live online tools (for example, chat, whiteboards, breakouts)
- ▶ Optimize use of live online tools to solicit input, enhance learning, and encourage collaboration
- ▶ Troubleshoot technical problems and implement backup plan as needed

## Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
<b>Delivery of content</b>	Content is delivered as designed, using appropriate methods and activities
	Delivery of content does not reduce time designed for practice
	Language, including examples, is clear and appropriate for participants
	Bridges and transitions are clear and link sections appropriately
	Non-verbal communication supports participant interaction
<b>Group discussions</b>	Discussions engage participants by asking open questions
	Discussions draw on participants' experience to reinforce learning
	Discussions encourage participation from all participants
<b>Participant questions and comments</b>	Questions are encouraged in order to enhance the learning of individuals and the group
	Questions are acknowledged and paraphrased to ensure understanding
	Questions are answered or deferred, as appropriate
	Facilitator verifies that a response addresses the participant's question
<b>Differences and controversy</b>	Differences are handled in a manner sensitive to cultural norms and with composure and respect for individuals and the group
	As appropriate, open expression of differences is encouraged in order to enhance the learning of individuals and the group
<b>Visual aids, equipment, and online tools</b>	Visual aids, equipment, and tools are used effectively to support achievement of learning objectives, in accordance with design and operating instructions

# 4. Foster learning

## Importance

The impact of mastering these competencies is that you:

- Establish and retain credibility with participants.
- Support participants in meeting the learning objectives.
- Help participants interact and support one another.
- Support the transfer of learning to the workplace.

## Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

4a	<b>Demonstrate appropriate expertise</b>
<input type="checkbox"/>	Establish credibility by providing your credentials, including related experience
<input type="checkbox"/>	Demonstrate understanding of the organization and relevant job performance
<input type="checkbox"/>	Present information and concepts clearly
<input type="checkbox"/>	Use relevant facts, examples, or analogies to respond to questions or illustrate concepts, and make sure that they are appropriately sensitive to local gender norms and political and religious sensitivities  
<input type="checkbox"/>	Partner with subject matter experts
<input type="checkbox"/>	Refer participants to resources for content beyond the scope of the learning experience
<input type="checkbox"/>	Communicate using language that is appropriate to the participants' educational levels and pre-existing knowledge of the subject
4b	<b>Facilitate individual and group activities</b>
<input type="checkbox"/>	Provide opportunities for participants to actively engage with the content
<input type="checkbox"/>	Set clear expectations for outcomes of activities and link to learning objectives
<input type="checkbox"/>	Give clear instructions for activities
<input type="checkbox"/>	Monitor progress, providing clarification and coaching as needed
<input type="checkbox"/>	Create a supportive environment for participants to provide feedback to each other
<input type="checkbox"/>	Provide opportunities to present and share individual and group work
<input type="checkbox"/>	Foster development of self-confidence and leadership skills into learning as needed 
<input type="checkbox"/>	Include peer-to-peer learning 
<input type="checkbox"/>	Debrief activities to reinforce learning
<input type="checkbox"/>	Be patient and allow plenty of time for participants to practice during the program 

#### **4C Facilitate to support the transfer of learning and sustained performance**

- ▶ Provide job-related and organization-related examples while facilitating
- ▶ Link learning content and activities to job and organization requirements
- ▶ Provide opportunities to use job aids and other relevant transfer materials while facilitating
- ▶ Introduce transfer activities and their importance while facilitating
- ▶ Follow up on transfer activities (for example, action plans, peer coaching), as appropriate

### **Key outputs and assessment criteria**

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

<b>KEY OUTPUTS</b>	<b>ASSESSMENT CRITERIA</b>
<b>Facilitator credibility</b>	Facilitator demonstrates understanding of content, organization, and participants' roles
	Participants acknowledge facilitator's qualifications and credibility
<b>Activities and practice</b>	Instructions for activities and practice are clearly presented
	Activities and practice are linked to learning objectives
	Participants discuss the results of their activities to reinforce learning
<b>Positioning of transfer activities</b>	Learning content, examples, and activities linked to job and organization requirements
	Importance of transfer activities is positioned while facilitating
	Job aids and other relevant resources are incorporated into learning

# 5. Assess learning

## Importance

The impact of mastering these competencies is that you:

- Support participants in their efforts to achieve the learning objectives.
- Provide feedback and coaching to help participants improve their performance.

## Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

<b>5a</b>	<b>Confirm that participants have prerequisite skills and knowledge</b>
▶	Assess whether participants have prerequisite skills and knowledge (for example, administering pre-tests, checking human resources records, completion of prerequisites)
▶	Address gaps in prerequisite skills and knowledge (for example, ask participants to re-enroll when ready, provide participants with additional resources, refer participants to additional learning)
<b>5b</b>	<b>Assess individual achievement of learning objectives</b>
▶	Conduct formal or informal assessments as designed to assess performance on each learning objective (for example, test questions for comprehension, observation of practice or role play for application)
▶	Evaluate achievement of each learning objective before moving to the next learning objective
▶	Provide post-assessment feedback and coaching
▶	Provide additional opportunities for learning and practice, as required

## Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Qualified class list	Individual participants meet entry criteria for learning
	Individual participants have completed prerequisite learning
Assessment of individual learner performance	Individual participant performance is assessed against each learning objective
	Individual participant performance is assessed, as designed
Feedback and coaching on performance provided to participants	Feedback is specific, balanced, constructive, confidential, and respectful
	Feedback is related to learning objectives
	Coaching provides corrective action where required