

# Facilitating Workshops



“Tell me, and I will forget. Show me, and I may remember.  
Involve me, and I will understand.” *Confucius 450 BC*

## In this briefing:

- Pg.1 **What is facilitation**
- Pg.2 **How people learn**
- Pg.6 **Preparing for a workshop**
- Pg.9 **Workshop facilitation skills**
- Pg.13 **Troubleshooting**
- Pg.15 **Evaluation**

Running a workshop is a great way to share your skills or to help people learn from each other. Doing this means that no-one has to reinvent the wheel and it empowers people to do things they want to do.

Facilitating a workshop can feel daunting if you are new to it, but with a little bit of thought you can put together a good workshop even if you don't have a lot of

experience already. This briefing offers some basic principles and practical ideas to help you do that.

You may also find some of our other briefings useful. For example: *Facilitating Meetings* and *Facilitation Tools for Meetings and Workshops* as well as some of our Short Guides.

## What is facilitation?

Workshop facilitation is about helping a group to gain skills and knowledge. Unlike the stereotype role of a school teacher, it's not about being in charge. You don't even need to be an expert in the workshop topic (although it can often help). The key to good facilitation is that you and the participants are equals – you all share responsibility to create a good learning experience.



## Workshop facilitation in practice?

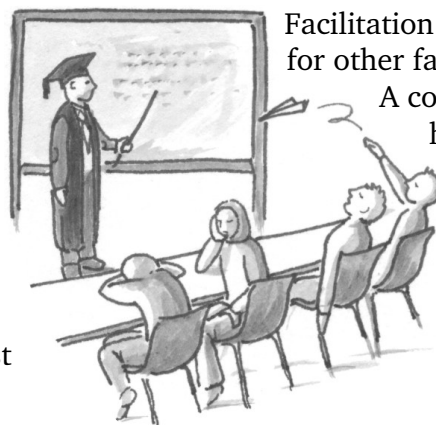
Facilitating a workshop involves a range of different responsibilities. The thing we often think about first is how to **get knowledge and skills across** – what we might call teaching. Sometimes top-down 'teacher-like' methods can be effective, and you might use them as a facilitator. For example, if a group of people had no knowledge on a topic you might start with a presentation or demonstration before letting them apply what they learnt.

However, the knowledge doesn't have to come from the facilitator. Your job is often about setting up activities that enable people to **learn from each other and build on their own knowledge**. For example, you might run a skillshare for experienced bakers where they list

common problems and then work together to find ways of addressing them. Even if the workshop is about something which is new to the participants, you can still encourage them to draw on their life experiences instead of telling them everything. For example, you might start an 'introduction to mediation' workshop by encouraging participants to reflect on their experiences of conflict in their own lives.

Facilitation is also about taking responsibility for other factors which enable people to learn.

A comfortable venue, enough breaks, helping create a safe space and good time keeping are all part of facilitating learning. This can be a lot to think about all at once, and some people choose to share the facilitation role. More tips on co-facilitation can be found below.

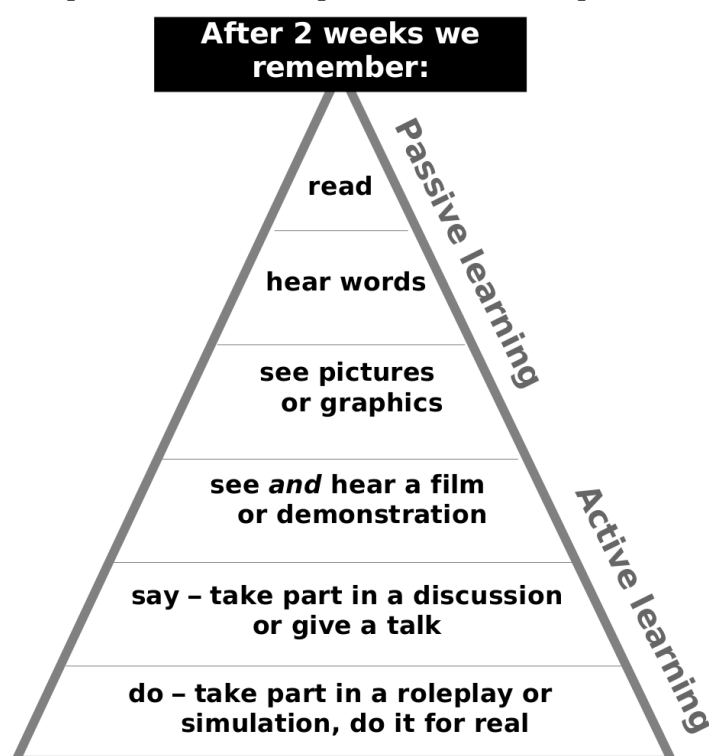


# How people learn

Before you start planning your workshop, give some thought to the ways that people learn. Below, we have laid out a few of the ideas and pointers that we have found most useful. The best way to understand this subject, however, is to watch and listen to the people who come to your workshops and learn from them. No two groups will be the same, and over time you will develop your own ideas about how best to support different people's learning.

## Remembering what we've learnt

If you want someone to know something, you may think that the best option is simply to tell them. However, it can be hard to concentrate on listening and remember things that are said to us. As the diagram demonstrates, most people learn more if you back up what you said with visuals. It's better still if the participants play an active role like talking about the topic, and best of all if they actively take part in a lifelike experience, such as a practical session or roleplay.



### Implications for facilitation

The ideal is to design activities which give people a 'lifelike' experience for everything in your workshop. For example, if you're teaching people how to fix a bike puncture, they will probably need to practice it themselves before they can remember the procedure. However, sometimes there isn't enough time to practice everything, or your topic may be quite abstract, making it more difficult to give people 'real' experiences. In these cases, visual aids and getting participants to talk things through will help them remember more. For example, in a workshop called 'understanding climate chaos' you could give participants questions to answer in small groups, back up your presentations with images and find ways for them to relate the information to their own experience.

## Long term memory

If participants are to continue reflecting on and learning from what happened in your workshop, they need to transfer the new knowledge into their long term memory. As the diagram above shows, getting participants active and involved is key. It also makes a massive difference if you revisit ideas instead of just covering them once.

### Implications for facilitation

In order to keep people engaged you need to find ways of revisiting content without the workshop becoming repetitive. Cover the same skill or set of ideas in different contexts, so people can think about and apply what they have just learnt. For example, in a wild food foraging workshop you might learn some technical vocabulary to describe the leaves of one plant, and revise that vocabulary looking for the same type of leaves in other plants. You could also use quizzes or games to revisit knowledge or give people hand-outs and a list of further reading.

## Making the most of experiences

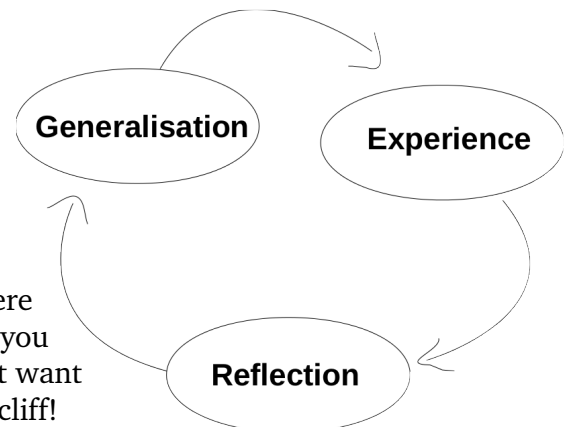
While people are more likely to remember things if they involve a 'real' experience, experience on its own won't get us very far. We also need to reflect on our experiences and make 'generalisations' about them.

In this context, generalisation means formulating our knowledge in a way that we can apply it to other situations. If we make a loaf of bread which doesn't rise we might remember the experience of making it, but decide it is easier to go to the bakery next time! However, if we think through how we made it (reflection), and work out what we need to do differently next time (generalisation), we will have learnt something much more

useful.

We describe this as a cycle because we can start at any point and repeat the process many times, but the order in which we go through it tends to be the same.

Using the bread example, we start with a recipe (generalisation), make the bread (experience), think about why it didn't rise (reflection), decide we need to leave it somewhere warmer (generalisation) and try again (experience).



### Implications for facilitation

You can use this learning cycle to check whether your workshop plan enables participants to make progress. Where you start in the cycle will depend on the subject matter. If you are teaching people how to do hang-gliding, you might not want to start them off with the real experience of jumping off a cliff! Instead you would begin with giving a lot of information about the right way to do it (generalisation). Then you would let them gain experience in a controlled situation on the ground, and help them reflect on what they were doing. Only after all this would you let them do it for real.

In other, less critical situations, you can let people have a go first before providing any explanation. People could try out using chopsticks (experience). Then you could ask them to reflect on what worked or didn't work, and why (reflection). Then you could ask someone to demonstrate a successful method (generalisation) and then let people try it again (experience).

Here are some tips on how to bring each element of the cycle into the workshop plan:

**Experience:** The experience element of your workshop often takes the most time, and is crucial for learning. Sometimes it'll be possible to *actually* do it for real, e.g. making a bike trailer or climbing a tree. At other times you'll need to create conditions as close as possible to the real deal, for example through using roleplay.

**Reflection** provides an opportunity for participants to think about what they did and what the effects were. This can be done through building on experiences from the workshop or real life. This might be as simple as checking whether they've tied their knot right, exploring how they felt in a role play or considering how they interact with authority figures in their own lives. Make time for a debrief after any roleplay or practical activity and work out in advance what questions would be useful to ask.

**Generalisation:** Generalising turns our reflections on a specific situation into abstract under-

standing that can be applied to other contexts. Often this will be integrated into the reflection process. Whenever we think about an experience we automatically start formulating rules or generating ideas for how we might do it next time. For example, when observing that a kestrel is using the wind to hover, you then assume that other kestrels are likely to do the same, and use this information to identify them in future. The generalisation element could also consist of a presentation or demonstration from you – for example showing people how to wire up a circuit before they have a go themselves, or feeding in some extra tips after a debrief. You can reinforce this process by writing down the general rules people have created, or giving people a chance to try the roleplay/practice again and apply the rules – in other words, go round the cycle again.

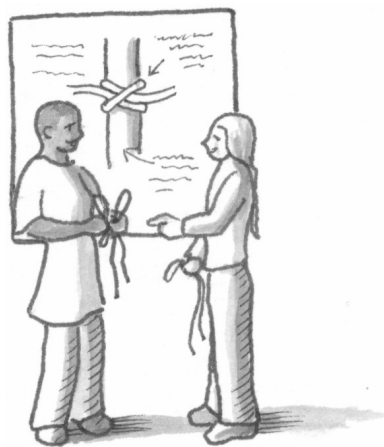
For more on using questioning and feedback in roleplays and debriefing see below.

## Learning styles

We all learn and remember things, but differences in life experiences and in how our brains process and store information mean we all do these things in different ways. Below we have provided a summary of insights into this as well as tips on how to use them as facilitators. The key is to build in variety, and not just provide the kinds of activities you would enjoy.

### The senses

Some people find it easier to understand and remember things that they find out about through one particular sense, e.g. visual (sight), auditory (hearing) or tactile/kinaesthetic (touch and movement). You give all participants the best chance of concentrating on and remembering something if they can access the ideas through their eyes, ears and bodies.



### Implications for facilitation

For the most important things in your workshop, include all the senses in the learning experiences. For example, you might have health and safety procedures written down, and read aloud, and give participants the chance to practice. Otherwise, just aim to provide a good balance overall.

Examples of how to support **visual learning** include writing things up on flipchart, providing pictures and charts, showing a film, demonstrating a task. Visual learners benefit from having instructions for an activity written down, and might want to take notes.

You can support **auditory learning** with lectures, discussions, music, poetry, and opportunities to talk through ideas and listen to other people. Strong auditory learners might need to read information aloud to turn written words into something they can process.

Support **tactile/kinaesthetic learning** by giving people a chance to do, move and touch. These experiences are easy to provide in a practical workshop, but more difficult with an abstract topic. For this reason conventional education is often less accessible to strong tactile/kinaesthetic learners. However, there are simple things you can do to help. Try movement-based activities like active games, spectrum lines, hassle lines and roleplays. Make information heavy sections more movement based, for example get people to arrange ideas on cut up pieces of paper, or set up paired conversations where participants change partners for each question. Even changing seats will help some people maintain concentration. (See our briefing *Facilitation Tools for Meetings and Workshops* for some facilitation tools and how to use them).

## Feeling safe and confident

We learn best when we feel safe – it means we are more able to take risks, and more willing to try out things and explore new ideas. Different life experiences, personalities and cultural expectations mean that what makes us feel safe varies from person to person, so remember that what might help you feel safe might be different for your participants. Here are a few factors to consider:

### **Help participants to get to know each other.**

Build a positive, trusting atmosphere by helping participants to get to know each other a bit. At the start of the workshop you could ask them to introduce themselves in pairs or in a go-round and say what interests them about the subject of the workshop. Small group tasks, games and breaks also help participants feel more comfortable with each other.

**Vary group sizes.** Many people find it easier to express themselves in a pair or small group, and don't like to join full group discussions. However, there are also people who feel more exposed and put on the spot in a smaller group, and prefer more impersonal bigger groups.

**Be aware of how confident participants are with the subject.** Some participants might be totally new to your subject, so be careful with making presumptions about their previous knowledge. For example, someone who feels insecure about their practical skills might very quickly give up on a 'fix your own bike' workshop if you assume that they already know how to use the tools, and skip this basic information. Similarly someone who is not into formal education might switch off very quickly if you use academic language. Avoid or explain technical terms, and be ready to explain things you think are basic, like how to get more leverage on a spanner, or what you mean by patriarchy.

**Check your cultural assumptions.** When you use examples and cultural references, speak to the real life experiences of all your participants, otherwise people will feel excluded and disengage from the workshop. Do you assume that

everyone will pick up on references to your favourite TV programme, that a 'couple' means a man and a woman and that everyone in your catering workshop is vegan? Think before you open your mouth, and step in if some of the participants talk or act in ways which might alienate others.

**Make sure activities are accessible.** Think about how people with access issues, (e.g. wheelchair users or people with hearing impairments) will be able to join in your activities. If possible, ask participants before the workshop whether they have specific access needs. This can be especially helpful for participants with invisible impairments, for example people on the autistic spectrum, or those who are hard of hearing. If you have people in the workshop who don't share your first language, take extra care to express yourself clearly, and encourage them to interrupt at any point to ask for an explanation. Also see our briefings *Access Issues at Meetings* and *A Facilitator's Guide to Making Meetings Accessible*.

**Build trust in your role as facilitator.** Participants might project the image of a school teacher onto you – help them realise that it is more empowering, and that they will learn more if they work things out for themselves rather than expecting to be spoon-fed answers. Build trust by being honest about what the workshop can deliver, be respectful about your participants' opinions (whether you agree with them or not), keep to time, treat everyone as equals regardless of whether you know or like some of them better than others.

# Preparing for a workshop

## Working out the content

To be effective you need a clear idea of what you want to achieve with your workshop. Sometimes this will come mainly from you – if you know what key information or skills you want to help people learn. In this case make sure any publicity is clear about what the workshop will involve, so people know what to expect. At other times the workshop will be in response to requests from the participants. In this case you need to find out as much as you can about their expectations. Ideally ask the organiser and consult participants in advance so you have time to prepare something that meets their needs.

You can also check participants' expectations and experience at the beginning of the workshop, and see how they match with the workshop plan you have prepared. However, don't raise hopes that you will change your plan to suit their expectations if that's not possible. With practice you will become better at adapting quickly in response to the group's expectations. In a longer workshop you may be able to check that you're meeting expectations at the end of the first day, or after a lunch break.

## The workshop plan

By preparing a workshop plan (sometimes called an agenda or running order) in advance, you can make sure that you are covering a realistic amount in the available time, and that you include activities that will help people learn. A well-prepared plan can make a big difference to your confidence, because you'll go in knowing when you're doing what, and why. It's also likely to make the experience more enjoyable and productive for both you and the participants.

### Aims

The first step is working out the learning aims for the workshop. What content do you want to cover and what do you want people to learn? The workshop aims are what you want to have achieved by the end of the workshop, for example, 'participants will be able to make a button hole' or 'participants will have a better understanding of the impacts of racism in their community centre'. Be as precise as possible. Do you want people to recognise different knitting stitches, understand how they work, be able to do them or all three? If you have to change your plans during the workshop, clear aims can help you check that what you are doing is still useful. Don't have more aims than you can keep in your head, and write them at the top of your plan as a reminder.

### Which activities in which order?

Next you need to develop exercises and activities to achieve your learning aims. You also want to think about how the different activities or exercises will fit together as a whole. Just like a good story, a workshop has a beginning, a middle and an end. The beginning is usually for participants to introduce themselves to one another, and relax enough to be ready to learn. The middle is usually the main section of the workshop where the learning takes place, and the end is the time to tie up loose ends and get ready to apply this new learning to life.

The previous section provides ideas for creating a workshop plan which enables people to concentrate on, learn and remember things. Make sure



## Timing

Be realistic about what you can cover in the time you have. It is usually better to give people hands on exercises and reinforcement that enables them to learn one thing properly than rush them through loads of material that they will have forgotten before they have a chance to apply it.

When working out timings for each exercise, remember to allow extra time as necessary. For example, the activity might be a paired chat for ten minutes, but you probably need to add on another five minutes for you to give the instructions, and for the participants to find a partner and a pen and forget what they were supposed to be talking about(!)

Do build some flexibility into your plan, in case an exercise takes longer than planned. Work out which exercises are less important and easiest to cut if you run out of time. You could also plan some extra practice in case everything is going quicker than planned.

## Planning activities in detail

As well as considering how the whole workshop fits together, think about exactly how each activity will work, what you are trying to achieve with it and how you will explain it to the participants.

**Aims:** just as with the overall agenda, work out for each exercise what you want to get out of it, both in terms of learning and group dynamics. If an activity doesn't fit your aims, save it for another workshop.

**Group sizes:** what kind of grouping will work for this exercise? The groups that people work in have a major impact on how different people participate. For example, whole group sessions can be more efficient if 1 or 2 people have information to share with the rest of the group. Pairs and small groups can make it easier for more people to be actively involved at the same time.

**Giving instructions:** giving good, concise and clear explanations for how to do activities is an important skill. If the activity involves several stages, consider backing up your spoken instructions with all the steps written down, or demonstrating the activity. When participants have started the exercise it is worth going round all the groups to check they are doing what you expect them to.

**Facilitator input:** if you are giving the participants input from your own knowledge or experience, strip down what you want to say to a small number of important points. Break it up so they don't have to listen to you for more than five or ten minutes at any one time. Think about how you can present the information in a way that fits different people's learning styles, e.g. backing up what you are saying with visuals or activities.

**Questions:** think about what questions you can use to draw out participants' learning, and how you might respond to questions they throw at you. If you are hoping that participants will pool their knowledge in order to learn more about something then it's worth having a list of important points to add in case they aren't covered by participants.

**Pre-empting problems:** try to predict the kinds of things that might go wrong with the activity, for example which bits might the participants struggle to understand. Decide whether you want to pre-empt these problems by giving people tips. Alternatively, be prepared to draw these things out in the de-brief.

## Practical preparations

Practicalities are also important in making your workshop more participatory, focused and enjoyable:

The **workshop space** should be comfortable, with plenty of natural light and air circulation and a comfortable temperature. The space should be set up to encourage participation – a circle of chairs works well – everyone can see each other and there is no automatic hierarchy in a circle. We prefer to clear the circle of any tables, as this creates less of a boardroom atmosphere and is more practical for breaking into small groups.

It pays to check any **equipment** that you or the participants will be using. This may just be about your workshop running smoothly – it can be very annoying spending ages preparing some slides and then finding the projector doesn't work. It can also be about having enough tools and equipment for everyone to participate – there's no point in running a carpentry workshop where only one person out of six has a sharp saw. Most

importantly it can be about safety – knowing the history of any climbing harnesses you hand out to people, for example. Beg and borrow, or limit the numbers in your workshop so that you have the right equipment for everyone.

Make sure **food and drink** is suitable for the group. Consider ethical concerns, food allergies and religious or cultural needs. Having tea and coffee breaks slows a workshop down, so if you want it short and focused, it might be best to give it a miss, wait until afterwards, or just have a jug of water and cups available.

Having said that, in a longer workshop, ignore **breaks** at your peril! People don't learn effectively when they're tired, gasping for a drink, or desperate for the toilet, so aim for a break roughly every one-and-a-half to two hours. Be realistic as to how long the break will take – if there

are twenty participants and one toilet, ten minutes won't be enough.

**Workshop times** – will people need to leave in a hurry? If so make sure important information or discussion happens towards the start of the workshop, or make extra sure you finish on time. Consider how start and end times fit with public transport if people are travelling to the event.

Think about how to **make your workshop accessible** to as many people as possible. Check whether your space is suitable for wheelchair users or people with other access needs. Are there other practical preparations you can make to help people access your workshop? Also see our briefings *Access Issues at Meetings* and *A Facilitator's Guide to Making Meetings Accessible*.

### Tools to aid equal participation

Be clear at the start that you want and welcome *everyone's* participation. Acknowledge that some people speak more than others, and ask people to be aware of their own and each other's participation – to make space for all voices to be heard.

Saying this once won't be enough – use tools which help people to participate such as:

**Handsignals** to create a queue for contributions. Tweak your queue to ensure it's not just the same people getting to speak. If you do this, make sure you explain why: *I'm going to start with the people who haven't spoken yet...*

**Small groups or pairs** to give more people the chance to speak and break up existing power dynamics. If you're getting feedback from small group work, ask for a new reporter each time.

Have a **go-round** to give everyone an equal space to express themselves. However, be careful not to put anyone on the spot. Make it possible for people to pass and say nothing if they don't want to.

You could use a **Group Agreement** at the beginning to set the tone for what is, and is not, acceptable behaviour.

## Preparing yourself - confidence

It's natural to be nervous before and during a workshop, and some adrenalin can be useful to keep you on your toes. However, feeling confident about your workshop will help both you and your participants enjoy it more. The first, and most important step is to have prepared your workshop well so you know it is well-designed and you are prepared for things which might go wrong. Rehearsing the whole workshop with a couple of friends can help a lot. You can also run through what you are going to say in key sections by yourself – maybe the workshop introduction, any presentational sections and the introductions to the more complicated activities.

Get **participants involved right away** with energisers and introductory go rounds. If they are warmed up and more relaxed it'll help you too. Try practising **deep breathing**: if you feel yourself getting nervous take a couple of deep, slow breaths and feel your feet on the ground.

Making mistakes is an important part of becoming a better facilitator. Accept that it's inevitable and commit yourself to learning from them. Bear in mind that the participants won't be aware of most of the mistakes you make, and that an activity that doesn't work for one person will probably be just right for someone else. Being confident doesn't mean the same as being perfect.



# Workshop facilitation skills

This section gives an overview of some of the skills involved in facilitating a good workshop. Every workshop is different, so not all these points will be relevant – use your own judgement and work out your own ways of making things work.

## Active listening

(For more on active listening see our Short Guide on *Active Listening*).

Active listening is a key facilitation skill: it's when we pro-actively look and listen for what someone else is trying to communicate, while trying not to project our own thoughts and expectations onto them. In workshops it is vital for working out what participants already know and think about the topic. This means you can adapt the workshop to their needs, deal with anything you think they have misunderstood, and avoid wasting time telling them things they already know.

Show that you're listening. Be aware of how body language such as an interested facial expression and maintaining good eye contact helps participants feel valued. Avoid signs of impatience such as looking at your watch, or flicking through your notes. Try not to fake it! You might have half a mind on figuring out how to save time in the next exercise, but you do also need to focus on what someone is trying to say.

## Summarising

Summarising is closely related to active listening. You can show people that you've heard them properly, and have understood their point by rephrasing the core of what they said and offering it back to them. It's important that you don't simply repeat what they said word for word, but show that you've understood any emotion or key concepts they've expressed.

A good summary not only shows participants that you have listened, but is also an effective way to check whether you've understood them. Offer the summary tentatively – use phrases such as: *What I hear you saying is... is that right?* or: *Would it be fair to say that you feel...?* If you restate in bold terms such as: *so you feel that...* or: *you believe...* and you're wrong, not only does it show that you haven't been listening, but you risk offending the speaker by misrepresenting them. Summarise succinctly – learn how to boil things down into one or two short sentences. This is essential if your summary is going to make things clearer and help people move forward.

## Asking questions

Questioning is a technique often used by facilitators during workshops as an alternative to presenting information and giving answers. Asking the group a question, or series of questions can enable them to find their own solutions and puts them in control of their own learning. Effective, well-planned questioning can support people to reflect on and learn from their experiences.

### Ways of asking questions

Here are some strategies for ensuring your questioning gets good results:

Have a **clear aim**. What learning are you trying to achieve? When you are planning the activity, prepare questions that reflect this.

Think about how the words you choose will impact on the answers that you get. For example, there's a big difference between "How did you feel?" and "What did you think?". Do you want participants to discuss emotion and experience (the

### Asking questions - an example:

You want to help an inexperienced group gain some skills at giving media interviews. You could give them a presentation on top tips for interviews. Or you could ask them questions:

"Think of an interview you've seen or heard recently – did the interviewee come across well? ... Why? What made the interview a success? ... What was it about the way they spoke that made them sound so well-informed? ... Anything else? ... What did they do that was less successful? ... What do you think might have worked better instead? OK, so to summarise, you think that a good interview..."

first question), or ideas and opinions (the second question)?

Use **open questions** when you want to open up and explore issues. Use them to draw people out and to let participants direct what is to be discussed. Open questions are questions that cannot be answered by a simple “yes” or “no” answer. They start with words such as *Why...?* or *What happened...?*

**Closed questions** generally invite a “yes”, “no” or “don’t know” answer. There is a place for closed questions when you want to clarify points, get information quickly or when you want to deliberately restrict options, for example “Would you like to stop now, or go on for another 15 minutes?” excludes the possibility of going on for more than 15 minutes. Whereas the open question: “How much longer do you need?” could leave you carrying on for another hour or more!

## Giving feedback

Feedback helps people learn from their experiences. Sometimes participants can offer feedback to each other, but the facilitator’s contribution can be vital. You have the benefit of preparation and probably a better knowledge of the topic, and that will help make sure participants come away with something useful. Plan in debrief sessions at the end of practical activities and roleplays, and be ready to offer feedback to participants throughout the workshop.

### Positive feedback

It helps to start with the positive feedback – many of us aren’t very good at recognising our own abilities, so it’s important to tell people what their strengths are so they can build on them. Giving positive feedback first also helps make people more receptive to being told what could be improved.

Specific feedback is more helpful. If we say something general like “*That was brilliant!*” people often don’t believe us. If you try to pinpoint what the person did and what effect it had then you are providing the whole group with strategies they can use in future. So, for example, rather than “*You did well*”, try “*When you transplanted the seedlings you left plenty of soil round their roots, which means they are more likely to survive.*” If you’re giving feedback to a group, direct comments at named individuals where appropriate. We learn better when feedback is made relevant to us: “*Joanna, you followed the safety procedure well when you checked your knot before beginning to climb.*”

### Negative feedback

Don’t shy away from negative feedback – it is very useful for learning. Think carefully about how you offer it though. First of all work out whether you have really spotted someone doing or saying something that is ‘wrong’ or do they just have a different idea from you? Next decide whether it is in the interests of the group for you to point it out.

Finally work out how to bring it up. Be very clear whether you are offering a personal impression, a difference of opinion or something you are factually sure about. Starting with the word *I* can show you know your impressions are subjective: “*I felt that your clenched fists made you come across as aggressive.*” Telling people where your information comes from can help them trust you and make it seem less personal: “*I checked the HMRC website this morning, and in fact what the law says is...*”

Again, the more specific you can be the better. Limit your comments to criticising what people did and not who they are. There’s a world of difference between saying “*You didn’t secure your harness,*” and “*You’re a liability!*” Negative feedback is most useful if you can follow it up with ideas about how things could be done differently. For example, “*You held the seedlings by the stem – doing this can more easily damage the plant than if you hold it by the leaves.*”

#### Debriefing - an example:

You have run a roleplay on bullying in the workplace. You might start by asking all the participants and observers what they noticed themselves doing and how it felt. Follow up by digging deeper to help them reflect on the experience: *Was there anything in particular that you found humiliating? What was it about the way Katie responded that you wished you had done too?* Then finally: *Can you draw out a list of tips that help you feel assertive? Is there anything you intend to try out in your relations with your own manager?*

## Facilitating roleplays

If you are running a practical workshop it is usually quite easy to work out how to get people practising new skills 'for real'. pruning an apple tree or installing Linux on a computer. However, with other skills like dealing with sexual harassment or offering counselling you will probably need to rely on roleplays to give people an experience to reflect on. Because it doesn't matter if people make a mistake in these practice sessions it's a safe space to practice skills and receive feedback.

In a roleplay a scenario is set up and participants are asked to act out different roles that are relevant to the subject matter and specific aims of the workshop, e.g. playing the part of the police in a 'know your legal rights' workshop. Alternatively, you can get people acting as themselves in a new role or situation, for example trying out facilitation in a 'how to have better meetings' workshop. Some people recoil from the idea of a roleplay – remind them that playing roles can offer useful insights into someone else's perspective on a situation. At the same time, make it clear that participation is voluntary and that there are useful observer roles for those that prefer to avoid an active part.

There are three stages to facilitating roleplay: *setting up*, *running the activity* and *debriefing*.



When **setting up** you clearly explain the scenario (and possibly the geography of the space) to participants and ask for volunteers for the various roles. It's a good idea to give role players a bit of time to get into character. You might give them a quick briefing, or provide role cards with a short description of their character, e.g. their key concerns or issues, or some examples of the kinds of thing they might say.

Ensure you give appropriate 'health and safety' warnings if the activity is likely to get physical. In very intense activities you may need to use a whistle to stop the action as people may be so involved they don't hear you shout. Alternatively, you could agree a safety word – if anyone shouts the word then the roleplay will stop immediately. Obviously it should be a distinctive word that is unlikely to come up in that roleplay.

**Running the activity:** announce the start of the activity and allow the action to run until: you have got all the learning out of the activity, participants have run out of steam, you run out of time, someone is becoming distressed, the action is getting a bit tough and injuries look possible or there's a natural moment to break.

When you stop the activity give people a chance to recover before you start the debrief. Some activities are very physical and people may need to get their breath back and replenish their blood sugar, or get a drink. They may also need to get out of role and let go of any strong emotions. You will need to judge the level of 'de-roleing' required, depending on the intensity of the roleplay. A few options are: a 10 minute break, a quick energiser, a few deep breaths, shaking hands and exchanging a few words with the other participants or a visualisation that takes people's attention elsewhere (e.g. to a pleasant memory).

The final stage is **debriefing**, which is probably the most important aspect of the activity. It gives participants a chance to reflect on their experience, to process their learning and to think about how they will apply it in real life situations, so do allow plenty of time. Rather than just having a free discussion, ask the group a series of questions that will help them get the best learning from the experience. We find the following stages useful when debriefing.

**How did you feel?** Start by asking people how they felt during the roleplay.

**What happened?** Then ask questions about what happened. What did people notice?

**What can you learn from it?** Next encourage discussion. Help participants work out the implications of what happened and how they felt. *Can you think of any reasons why you felt or acted that way? Which of the things you said or did were most effective? Can you see any patterns emerging?*

**How will you apply it?** Ask questions about how this learning can be applied to new situations. *Is there anything you want to do differently next time? What tips do you want to bear in mind for the future?* If it's useful, make notes on a flipchart or write up the debrief.

## Writing up contributions

Even if you don't use blackboard and chalk, you may feel like a school teacher when you write up participants' contributions. However, it is a very simple and useful way of helping people concentrate and remember so it is worth doing and getting it right.

### Practical Points

There's no point using visual aids if people can't see them, or can't hear you talking. So, talk to the group, not to the paper! It's better to pause whilst you write than lose what you're saying in the process of writing. You could also ask your co-facilitator or one of the group to write for you. Ask if everyone can see the writing. If not, either move the flipchart or ask participants to move. Your flips will also be easier to read if you write neatly in lower case letters and make sure you write big enough.

### Writing up the groups' contributions

When writing up comments use your active listening skills to accurately summarise and restate the comments made. Make sure you check with the person who made the comment, as you may have misunderstood. Don't show any favouritism – value all contributions equally and write down all comments. If there's a reason why you're not writing something down (because it's already on the paper, for example, or it's incorrect) explain it to the group.

### Helping people remember

Use headings: they help us build mental associations, so we can remember and 'file' our learning appropriately. Instead of linear lists, you could use spider diagrams or mind maps – they can be easier to remember, and make it easier to cluster different contributions. Using colour and pictures also helps people focus and remember. If colour contrast is important then be aware of colour blindness – ask the group if any particular combinations are a problem, or, if preparing in advance, avoid putting green and red together because this is the combination which most often causes difficulties.

## Working out what the group wants

Help the group to be in control of their learning experience by offering them choices, for example: *Do you feel the need for a break?* or *Would you like to practice that again or are you ready to move on?* However, by posing these questions to the group as a whole there is a danger that you only get to hear the most confident voices, or that participants spend more time trying to agree what to do than doing it. You could present the group with a limited range of options and use a 'temperature check' or other quick prioritisation tools to get a quick sense of how everyone feels about each one. Alternatively base your decisions on your own observation of the group rather than asking them outright – if you can see people flagging you can probably guess that they need a break, and if you have watched them doing an exercise you can make a good guess as to whether they need more practice or not.

## Co-facilitation

Co-facilitation means sharing the work of running a workshop. This might involve simply asking someone to take on a particular role in a particular exercise: time-keeping for example, or welcoming late arrivals (see co-facilitation roles below). Alternatively, it might mean working together with someone else to prepare, deliver and evaluate the workshop. This can make the prospect of running a workshop less daunting if you are new to it, and is a good way to share your skills if you are an old hand.

However, co-facilitation isn't always straight-forward and easy. It can be a real test for your communication skills. It is best to be clear about who has responsibility for what at all times, whether that means alternating activities or assigning a particular role to one person: writing things up, for example. Even if one person has taken on planning an activity, make sure you both have a shared understanding of why it is there, and how to make it work so you can support each other if necessary.

# Troubleshooting in workshops

A workshop can involve unexpected and difficult situations that you'll need to deal with. Sometimes these are unforeseen practical problems, like fire alarm practice in the building. At other times they're down to group dynamics or behaviour. We can't include every possible scenario here, but we have provided some general rules, as well as tips for dealing with common situations.

## **Give yourself time to think**

Don't forget that as the facilitator of a workshop you can ask for what you need in order to better serve the group. If things are going wrong then don't feel you have to think entirely on your feet while you maintain a smooth 'performance'. Acknowledge that things aren't working the way you planned and offer the group a quick break while you think it through or chat to your co-facilitator.

## **Ask the group...**

As well as checking that you're meeting their expectations, you can use the group to solve other problems. If a session isn't going as smoothly as planned, or energy levels are low, you could ask the group what they want to do about it. Be aware though that working out what everyone wants isn't always straightforward – sometimes presenting them with a narrow range of options can be easier than asking open questions. Never be afraid to admit your fallibility, and move on to the next exercise if the group isn't engaging with the current one – make sure to capture relevant learning first!

## **...but don't blame the group**

It is easy to get frustrated when your workshop isn't going to plan, especially if you feel that it is being de-railed by the behaviour of one or two individuals. In this situation it is vital to remember that the problem is someone's behaviour and not them as a person. It's also important to realise that they're rarely deliberately making life difficult for you or the group.

We can often deal with problems more effectively if we take a step back and consider what the apparently 'difficult' individual might need and whether we can offer it to them. We all bring a number of needs and wishes with us, whenever we work in a group, for example the need to be acknowledged, to connect with others, to learn something new. We usually can't provide long term solutions to these needs in a workshop, but we can often help make someone's experience better. For example, if some participants look bored during long presentations then a quick energiser and some more interactive activities might be all they need to get them interested again.

## **Some examples of common problems you might face:**

### **Dealing with over-participation**

You might find yourself faced with a small number of participants who dominate discussions. You can reduce the impact of this by planning your workshops with lots of tools for increasing participation. If you are having a full group discussion a simple tactic is to tell the group that you are prioritising contributions from people who haven't spoken much yet.

Sometimes, people will dominate because the workshop isn't meeting their needs. For example, you may be faced with someone who constantly interrupts to make their point, or who returns to the same subject over and over again, even though the discussion has moved on. These can be signs that your participant doesn't feel that they've been heard and their opinion valued. Taking the time to actively listen and to offer a tentative restatement of their point can be all that is needed to help them move on. Bear in mind, though, that while some people are able to speak succinctly on a topic, others need longer to express themselves. Avoid jumping in with your summary too soon and try to foster patience for people who need a bit more time to get their ideas out.

### **...or under-participation**

Some people might not join in with discussions or other activities. This may not be a problem – they have chosen to be there and may learn well in an observer role. However, it may be that they want to participate more, and you could make it easier for them by changing what you are doing.

Facilitation tools like paired listening and go-rounds give everyone a chance to have their say. Use

ice-breakers and energisers to help people warm up, and make sure you challenge any aggressive or dominating behaviour so that other people can feel safe.

Sometimes it will be one particular exercise that isn't working. Has everyone understood what they're supposed to be doing? Have you given them a rationale for doing it? Or perhaps you simply need to move on to something else? In all of these cases ask the group! *Is anyone confused at the moment about what we're doing?... Is this exercise working for you? If not we can easily move on.* Don't be afraid to ask for a few minutes to reorganise your plans!

### **Working with a sceptical group**

So what can you do when there are people in the group who are sceptical about the subject of this particular workshop, or the way you're facilitating? Firstly, check your group's expectations near the start of the workshop. Hopefully you'll find that you've prepared a workshop that's relevant to this group. If your plan doesn't meet people's expectations, at least you'll know, and can either change things if possible, or else suggest that people might want to leave.

It can help to explain at the start of each activity what you are aiming to achieve with it, and how it fits in with the overall aims of the workshop. If you can't (because, for example, the exercise needs them to come to it with an unprejudiced mind) explain this to them and make it clear that the rationale will become obvious.

Acknowledge any scepticism – don't just ignore it and hope it'll go away! You can be explicit – *I know some of you aren't sure how this workshop will help, but this is how I think it might be useful...*

Trust your workshop preparation – you've checked that it meets all the needs of a good learning experience. If you evaluate exercises regularly, you know what works and what doesn't. Be confident – not easy when faced with scepticism – but do it anyway!

### **Getting different numbers from those you planned for**

It's not uncommon to plan a workshop for 12 people and then find that only six show up, or vice versa. Do whatever you can in advance to find out how many people are likely to come.

When preparing, work out how you can adapt activities to deal with different numbers, or whether at a certain point you might cancel, or run the workshop twice in smaller groups. Often this is as simple as having some extra resources just in case a bigger group turns up, and being ready to do things as a whole group if there aren't enough people to break up into smaller ones. Sometimes you may have planned an exercise that you just don't see working with this number of people. Go back to the aims of the exercise – what were you hoping to achieve? How can you achieve those ends with this number of participants? It may mean you have to fall back on more traditional methods, such as ideastorms, go-rounds and whole group discussion – this is fine. As long as you keep the energy of the group up your plan should still work.

### **Late arrivals**

When you are running workshops in informal settings it is very common for people to arrive late. One way to get round this is to state clearly beforehand that the workshop will start promptly, and/or give some encouragement to be punctual, e.g. tea and coffee. Especially if you are feeling nervous you may be tempted to wait until more people have arrived. In this situation you could check what the people who have arrived on time want to do. They might prefer to wait until everyone is there, or prefer to get the benefit of the full workshop you had planned. However, if it was clearly stated that the workshop will start on time, feel free to get going, particularly if you know that starting late would be detrimental to the workshop.

When people arrive late you need to find a balance between welcoming them and disrupting the workshop for everybody else. What you do will depend a lot on what's going on in the workshop when they walk in. If it is a small group activity, you could assign them to a group and ask the other participants to fill them in on what they have missed, or you could take the time to give them a quick summary yourself. If they arrive in the middle of you talking to the whole group, just acknowledge them with a smile until you reach a good moment to pause and welcome them, and then later take them aside and offer a brief run-down of what they have missed.

## Getting your timing wrong

Working out how long activities are going to take is always a guessing game, especially when you first start running workshops. During the workshop keep checking the time and if it is obvious that you are getting through things too quickly, or (more likely) too slowly, then allow yourself a moment to work out what to do about it. If an activity is taking longer than you expected, but is providing useful learning that meets your aims, then you may want to cut something short later in the workshop. An example is doing an exercise as a whole group rather than splitting into pairs and feeding back.

In less obvious cases go back to the aims of the workshop, and decide which activities are most crucial for achieving these aims. You may decide to offer the group some choices of what to do and what to cut, but beware spending as long deciding what to do as you would have done doing it.

Even though you might be feeling anxious about the time, avoid making people feel rushed as this would have a negative effect on the quality of their learning.

## Technical hitches

Check all equipment and venue practicalities before you start your workshop, and have backup plans that don't depend on technology. If something does go wrong unexpectedly, see if people can achieve the aims of the planned activity in a different way. For example, you might have planned to use some film clips as a starting point for small group discussions, but you might be able to offer them a verbal summary of the films instead. Or your participants were going to practice wiring an electrical circuit individually, instead of which you could put them in pairs. Don't hesitate to explain the situation to your participants, and ask how they would like to deal with it. For example, one of them might have the technical knowledge to fix your computer, or know someone who could do it while you got on with a different activity. Sometimes it might be better to reschedule the workshop entirely.

## Evaluation



Evaluating the workshop together with the group allows you to check that the workshop has met the group's expectations and gives you ideas for improvement. Build at least five minutes evaluation time into each workshop plan. Don't just evaluate the content. Ask questions about the quality of your facilitation, whether you met expectations, the pace and length of the workshop, etc. You can also ask if there are other workshops the group would like. Here are three evaluation tools:

- ★ **Go-Round / shout out** – ask participants to say things that worked well and things that didn't – ask them to be honest, as it'll help you learn how to do it better next time. Be open to criticism – listen for what went wrong and how they think you could improve. You can reflect later on whether you agree or not.
- ★ **More of ... Less of .. the same...** Divide a flip chart into three columns: more, less and the same. Hand out pens and ask participants to write down things that worked well for them in the 'same' column, things they wanted to see less of, e.g. 'use of jargon' and more of e.g. 'chances to practice new skills'. Encourage people to include reasons for what they are saying and then leave them to it to encourage honesty.
- ★ **Evaluation form** – prepare a form that has room for comments and maybe a way to score different aspects of the session. Evaluation forms take a bit longer to fill in, but you can glean more information than with other methods. Phrase questions neutrally. Encourage people to fill it in straight away, or you will never get it back. NB: take lots of pens with you – that way no-one has an excuse not to fill it in there and then!

For more ideas you can look at our briefing: *Facilitation Tools for Meetings and Workshops*.

## Facilitator's debrief

Debriefing workshops is essential for learning from our mistakes and improving future workshops. You can do it on your own, with your co-facilitator if you have one, or with someone else. Debriefs are a great way to deal with any problems in communication between co-facilitators, and can be a very creative process. It's amazing how much of the detail you'll forget after a week, so do the debrief as soon as you can after the workshop. A suggestion for structuring your debrief:

- 1) Overall: what went well/less well?
- 2) How was the relationship with the co-facilitator?
- 3) Go through each exercise: what went well/less well? (whoever facilitated the session gives their feedback first, then the co-facilitator offers feedback.)



## Further reading

### On the web

[www.seedsforchange.org.uk/resources](http://www.seedsforchange.org.uk/resources) Lots of guides to workshops, meetings, facilitation and tools for workshops. Some you may find useful for preparing workshops are: *Facilitating Meetings*, *Facilitation Tools for Meetings and Workshops*, *Group Agreements for Workshops and Meetings*, *Giving and Receiving Feedback*, *Using Question in Workshops*, *Access Issues at Events and Meetings* and *Facilitator's Guide to Making Meetings Accessible*.

[www.rhizome.coop/resources](http://www.rhizome.coop/resources) More resources on facilitation and tools.

[www.trainingforchange.org](http://www.trainingforchange.org) Excellent resource for all social change facilitators.

[wilderdom.com/games](http://wilderdom.com/games) wide selection of 'games' and activities to complement and support learning, including links to other resources.

### Books

**Training for Dummies**, Elaine Biech, 2005. ISBN: 0764559850. *Good resource to support ongoing learning. Lots of tips and techniques for existing or would-be facilitators.*

**How to Run a Great Workshop: The Complete Guide to Designing and Running Brilliant Workshops and Meetings**, Nikki Highmore Sims, 2006. ISBN: 0273707876. *Useful guide to developing and running participatory workshops.*

**Facilitating Group Learning: Strategies for Success with Adult Learners**, George Lakey, 2010. ISBN: 0470768630. *Very readable book with lots of examples from his extensive experience of facilitating social change groups.*

For more briefings and  
training workshops see:  
[www.seedsforchange.org.uk](http://www.seedsforchange.org.uk)

