In the Chat, share what do you want to get out of today’s session?
Ground rules for zoom today

MINIMIZING DISTRaCTIONS
• Minimize windows, put phone away, permission to step away

BEING PRESENT
• Video on, silent but unmuted, set to gallery view

STAYING ENGAGED/QUESTIONS
• Use the chat, annotate

MOVE UP/MOVE UP
• Invite members to move into roles they don’t usually take

NAMING
• Add first name, last initial, pronouns (if you want)
Objectives

By the end of this session, you will be able to:
• Define the role of a facilitator
• Identify educational opportunities to facilitate a small group
• Recognize the importance of creating a brave space (or environment) for effective communication and learning
• Name strategies for effective facilitation (preparation, staying on task, engagement, deepening conversations)
• Apply facilitation principles to virtual small groups
• Practice key strategies in facilitation
Schedule

• Introductions & Ground Rules (5 min)
• Facilitation Overview (15 min)
• Facilitation Skills (20 min)
  • Practice Skills (20 min)
• In-Person Skills (10 min)
• Close (5 min)
Introductions

3 minutes to share:

• Name
• Where you work
• An item of importance in the room where you are right now
What is a facilitator?

• a person who helps a group of people to work together better, understand their common objectives, and plan how to achieve these objectives, during meetings or discussions. (Wikipedia)

• an individual who guides the group to work more effectively, to collaborate and achieve synergy, and support the group to do their best thinking and practice.
Role of facilitator

• Set agenda
• Listen
• Build upon participants’ contributions
• Summarize
• Keep group on task
• Not a leader
• Not a participant (in most cases)
Opportunities for Small Group Facilitation

- When you want to go deeper in a topic
- Accomplish a task
- Controversial or complicated
- Connecting/Community building
- Processing

*No new material*
What are Common Challenges in Facilitating Any Small Group?

Breakout rooms
Common Challenges and Pitfalls

• Time management
• Engagement
• Safety
• Lack of clarity
• Preconceived agendas
• Mismatched expectations
• Superficial conversations
What are Common Virtual Challenges in Small Group Facilitation?

Chat waterfall
Virtual Pitfalls

• Tech gets in the way (no video, echoes)
  • Unstable connections
• Disengaged
• Distractions
• Problematic location
• Fatigue
• Awkward
Skills for Small Group Facilitation
5 Strategies for Small Group Facilitation

• PREPARE for the session
• Create and maintain a BRAVE SPACE
• STAY on task
• ENGAGE the group
• DEEPEN conversations and learning
PREPARE for the Virtual Session

Review feedback

- If you have presented material previously

Review the materials

- If there is a complicated activity, make sure you practice it so that it runs smoothly during the real session.
- Get to know your virtual platform and its capabilities

Plan with your co-facilitator

- Establish host/tech person
- Questions to ask your cofacilitator:
  - “What is the most important goal you want to achieve for this session?”
  - “What parts do you want to lead? Here is how I might ask for help?”

Strategize the session

- Gather supplies that are needed including a timer.
- Sign on early
- Practice the tech
What can you do to create and safe/brave space?

chat waterfall

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Create and Maintain BRAVE SPACE for Virtual Settings

Start w/ lower stakes
- Using an Icebreaker that connects people virtually
- Virtual ground rules
- Pair and Share in Breakout rooms
- Pop up rules

Model vulnerability
- Going First: “Let me share with one of the hardest moments for me when I was in middle school”
- Admitting mistakes, saying I don’t know
- Tech forgiveness

Encourage
- Expressing Gratitude: “Thank you so much for sharing that”
- Precise Praise: “That’s a really touching example of active listening”
STAY on Task

Communicate clear instructions

- Be clear about time constraints.
- Show or demonstrate instructions
- Multiple monitors

Watch the Time

- Using a timer or watch (Time Timer app), time functions in platform
- Calling attention to time: “I am noticing that we have 15 more minutes left to the session”

Interrupt if needed

- Ask permission: “Would it be ok if we talk about our own experiences with discrimination?”
- Acknowledge and redirect: “I am hearing some really good comments here, how might a patient’s relationship to religion influence a new cancer diagnosis”
- Cold call or popcorn for flow
Group Practice for Interruptions (5 min)

- Facilitator (earliest birthday)
- Observer (latest birthday)
- Tangent Learner (second earliest)
## Two Situations for Practice

### Conference Room Space: WOW
- Chair of your department has charged you with addressing complaints about the lack of diversity in the pictures on the wall in your conference room
- You are leading a discussion with key members of your department to discuss next steps

### Student Discussion: National Health System
- As part of your course, your group of students is tasked to discuss the pros and cons of creating a national health system
- You are the facilitator leading this discussion
Group Practice for Interruptions (5 min)

Instructions
1. Facilitator will ask a question
   “What are the potential benefits of swapping out the photos of past chairs?”
   “What are the cons of a national health system in the US?”
2. Tangent learner goes on tangent
3. Facilitator interrupts and redirects the conversation
4. Observer gives feedback
ENGAGE the Group

Mix interaction types

- Break out rooms
- Chat/chat waterfall
- Unmute/Video on
- Get them on their feet

Encourage shared airtime

- Warm call: “Can I hear from someone who hasn’t gone yet? Let’s here from someone who works with residents”
- Round Robin: “I will go around the room and ask everyone to share 1 idea they came up with”
- Write it down first: Some people just need extra time. Asking people to write an answer down first enables
UNMUTE the Entire Session

PCR Groups Self Rating

- Vulnerable
- Present
- Engagement

Unmuted Usual
Group Practice for Shared-air-time (5 min)

Observer (earliest birthday)

Facilitator (second earliest)

Dominating Voice (latest birthday)

Instructions
1. Facilitator will ask a question
   “What are the potential benefits of swapping out the photos of past chairs?”
   “What are the cons of a national health system in the US?”
2. Dominating voice tries to dominate
3. Facilitator uses a shared-airtime skill (warm call, writing the information down)
4. Observer gives feedback

“Thank you for your thoughts. Would anyone who works with residents like to share...”
Deepen the conversations and learning

Clarifying

• “That’s a really interesting... can you tell me more about what you mentioned?”

Building off of/ Piggyback

• “Would anyone want to add to Jeremiah’s comment?”
• Annotate

Paraphrasing

• “What I am hearing you say is that tracking non-verbal cues are really important to active listening”

Shifting Perspective

• “We talked about why this is a positive thing, can anyone say why it could be a problem?”
• Polls
Group Practice for deepening (5 min)

Instructions
1. Facilitator will ask a question
   “What are the potential benefits of swapping out the photos of past chairs?”
   “What are the cons of a national health system in the US?”
2. Group member gives superficial comment
3. Facilitator uses a deepening skill (clarifying, piggyback, paraphrase)
4. Observer gives feedback

Vague suggester (earliest birthday)
Facilitator (latest birthday)
Observer (second earliest)

“That’s a really interesting... can you tell me more?”
# Applying to the In Person Environment

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<td>Check out the room</td>
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<td>maintain BRAVE SPACE</td>
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<td>STAY on task</td>
<td>Use timers (e.g time-timer app)</td>
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Conversations and Close

share one takeaway in chat
What is One Takeaway You Got From Today’s Session?

share one takeaway in chat
References

