DOCUMENT RESUME

ED 441 984 CE 080 272

TITLE	Framing the Future: Workbased Learning Facilitation Tips.
INSTITUTION	Australian National Training Authority, Melbourne.
ISBN	ISBN-1-86506-110-7
PUB DATE	1999-00-00
NOTE	24p.
AVAILABLE FROM	Australian National Training Authority, Level 5, 321 Exhibition Street, GPO Box 5347BB, Melbourne, VIC 3001, Australia. Tel: 03 9630 9800, Fax: 03 9630 9888, Web site: http://www.anta.gov.au. For full text: http://www.tafe.sa.edu.au/institutes/para/ftf/facnet/facilitators%20tips.pdf.
PUB TYPE	Guides - Non-Classroom (055)
EDRS PRICE	MF01/PC01 Plus Postage.
DESCRIPTORS	Adult Education; *Classroom Techniques; Developed Nations; Foreign Countries; *Group Discussion; Group Dynamics; Group Structure; Labor Force Development; *Leadership Responsibility; Postsecondary Education; Program Implementation; Secondary Education; *Staff Development; Teaching Methods; Work Experience Programs
IDENTIFIERS	Australia; *Facilitators (Personnel Development)

ABSTRACT

This resource provides tips to assist facilitators as they work with Australia's Framing the Future project teams. The 16 tips are about group selection; how to prepare for input; participant roles; how to use participants and observers; scribes and recorders; some ideas for launches and fun; praise! praise! praise!; making facilitation the key to success; a facilitator's checklist; setting a clear meeting agenda; setting the flow of the meeting; jump-starting discussions; deciding when a discussion should be reopened; meeting formats; ending the meeting; and maintaining group memory. A work-based learning facilitator profile concludes the publication. It outlines the facilitator's role, tasks, and personal attributes. (YLB)

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framing the *future*

Workbased Learning

Facilitation Tips

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First Published 1999

National Library of Australia
Cataloguing-in-publication data

Australian National Training Authority.
Framing the Future: Workbased Learning Facilitation Tips

ISBN 1 86506 110 7

1. Vocation education - Australia
2. Occupational training - Australia
3. Employees - Training of - Australia. I. Australian National Training Authority.

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Further information:
Australian National Training Authority
Level 5, 321 Exhibition Street
GPO Box 5347BB
Melbourne VIC 3001

Telephone: 03 9630 9800
Facsimile: 03 9630 9888
ANTA Web Site: www.anta.gov.au

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Introduction

Framing the Future is a major national staff development initiative funded through the Australian National Training Authority. Its primary objective is to provide a structure for people in the Vocational Education and Training sector to develop the skills and knowledge they need to implement the National Training Framework. Since inception in 1997, over 250 workbased learning project teams have been funded and supported through Framing the Future.

The role of the facilitator in workbased learning project teams has been identified as a critical success factor. The successful outcomes both learning process and task completion rely to a large extent, on the skills of the facilitator.

The following tips are provided to assist facilitators as they work with their Framing the Future project teams. Other resources for facilitators are located on the website www.tafe.sa.edu.au/institutes/para/ftf along with details of Framing the Future publications which can be ordered online or viewed and downloaded from the site.

Group Selection

When a facilitator or project manager selects participants for facilitated workbased learning sessions, it is important that the group be composed to maximise the opportunities for successful learning. If you have an opportunity to influence the selection of workbased learners, you may like to consider establishing a criteria. Not all criteria are appropriate in every situation and you need to carefully establish a criteria for your project, but in any case some areas of consideration are:

Is the participant:

- interested in the project task
- likely to have a stake in the project outcome
- empowered to make decisions or recommendations about the project task
- open to solutions other than their own
- open to learning.

As a group, depending upon the session(s), the participants should:

- be knowledgeable in some major area of the business/organisation/project that can contribute to the project
- for a Framing the Future Project, be drawn from either the training organisation or an area of industry that is directly relevant to the project.

How does your selection measure up?

Would you add anything to the criteria from your experience?

Tip Two

Prepare For Your Input

Good facilitators understand the importance of knowing their process. Your role is to manage the group dynamics which can be very challenging, and uneffective if you are facilitating an unfamiliar process. In a workbased learning environment you may use one of many types of processes, including action learning. In the workplace learning environments the facilitator role can be clearly seen by the pneumonic ACTORS:

- **A**genda, know the order of the facilitation processes and the meeting
- **C**limate setting to maximise the learning and enquiry by the facilitator
- **T**echnique or process used to gather or introduce information throughout the project (eg listing, brainstorming, grouping)
- **O**rder, timing and estimated duration for each process and the project
- **R**ecording method used to document information as it is received, reviewed and used during the process
- **S**upplies required to perform the process (e.g., butchers paper, OHT's etc)

Knowing the process requires careful planning. If done in advance, the planning allows the facilitator to focus the attention of the participants upon the quality of the content and learning that has come from the project activities.

Tip Three

Participant Roles

When preparing to facilitate a workbased learning project session it is always handy to have a checklist, particularly when you need to think about the roles of participants in individual sessions.

Check List for Preparation Have you...

- Project Purpose

  Reviewed the Framing the Future action plan and agreed purpose of the session
  Project Manager and briefed the project sponsor?

  Developed and distributed an agenda and record of past meetings?

- Prepare For The Meeting

  Prepared the room, catering and other resources?

  Spoken with the people responsible for key roles or particular activities for the meeting?

  Prepared appropriate resources to ensure the participants can move towards the project activity agreed for that meeting?

  Assembled the materials you will need?

- Prepare For The Learning

  Reviewed the potential learning barriers, the session attendee's and any special circumstances that will arise in the session based on past meetings with the group?

  Reviewed your agreed workbased learning process?

How does this list meet with your needs?

What would you add or subtract from the list?

Tip Four

How To Use Participants And Observers

Workbased learning projects sometimes use participants and observers in different roles.

Participants are members of the learning activity or project set.

Observers are people who have a stake in the outcome but who are not active participants in the workbased learning project set.

Facilitators can utilise participants and observers differently.

Participants

Participants are generally responsible for developing the project activities for the meeting. To this end, you may ask participants to take the following responsibilities:

- Understand the session purpose and desired project activities
- Pre-read materials distributed to participants and the results from prior sessions
- Undertake activities between meetings
- During the session, listen carefully to the points made by others, providing support where appropriate, contribute, but share the air-time.
- Tolerate disagreement
- Seek win-win solutions; be open to alternatives.

Observers

Observers are those who may sit in on sessions, or participate offering specialist advice or expertise for parts of the project activities. Observers should:

- come to the session with an understanding of the session purpose and desired outcomes and if necessary, their role in that session
- participate as agreed either beforehand or during the first stages. They may quietly observe the session activity without impacting the result or be active participants during the meeting. There should be no doubt as to their role however.

As a facilitator you might establish some ground rules with your project set at the outset as to how observers will be treated during the project.

How would you vary the ideas above for your project, what would you add or subtract?

Scribes And Recorders

How do you record set activities? Do you use a recorder, or just have someone document the session for participants after the meetings?

Recorders are the individuals who record what is happening **during the project meetings** to ensure that the comments made by participants are **visible for all to see** This means that they may use OHT's, flip charts or white boards. Having all participants in a session **see** the comments as they are made can help keep the group focused and reduce misunderstandings.

To ensure that the comments recorded accurately reflect the intent of the participants, it is essential that the recorder avoids paraphrasing or making alterations.

It is not essential that every word is recorded, but it is important that what is recorded are the words of the participants that capture meaning. In a workbased learning process this can be a handy reflection tool for the facilitator.

The recorder role can be combined with another. For example, the Facilitator often serves as both.

Do you have room, or a need in your project for a recorder?

Other Meeting Roles

Most Framing the Future project sets use a combination of roles during a meeting. Within your project set you could create a number of different roles. A role is a specific job, such as facilitator or note taker. When you create set processes at the outset be sure to discuss and agree the expectations of each specific job with your project set. Some example roles could be:

- Spirit master
  Some one who looks for feelings such as anger or frustration and monitors how the group is treating individuals.
- Whistle blower
  Keeps track of how much time has been spent on an issue. Advises group when time allotted for an agenda item is up.
- Parrott
  Sits near the door and fills in late comers with the current status of the meeting and what has been discussed so far.

Some Ideas For Launches And Fun

At the beginning of a learning project the set members have to make a transition to being a member of the group. Ice breakers are a good start to team building.

The beginning of set meetings are crucial. It is the launching point for the whole energy of the meeting. Many facilitators use this time to do introductions. While this sort of sharing is a good idea, sometimes you can be much more creative. A group that starts into a meeting laughing and sharing will often negotiate project activities more positively. Have you thought about starting each meeting with a fun activity? Who knows, people may actually arrive on time!

You can also extend fun activities into the meeting, for example, discuss project budgets by giving everyone play money equal to an equal share of the budget dollars or establish an item of group membership. The Framing the Future squeeze balls can become a pre-requisite for morning tea, no squeeze ball, no coffee!

Make it fun! Don't forget games, role playing, drama, mystery and adventure regularily to break out of the routine rut of the meeting process. Your goal is to not only make project set meetings a learning activity, but also an enjoyable time.

It is the facilitator's role to create the climate for this fun, could you try to:

- sing your name and have the group sing it back to you
- break into small groups and do a mime skit about an agenda item
- become someone else, and mime it and have people guess
- sing and dance the song, the hokey pokey
- create a large imaginary map on the floor and have everyone stand on the town they were born or grew up in
- do a weather report on how you are feeling. "sunny and warm, cloudy with chance of grumpiness...."
- do a role play about an agenda item, with people playing positions (exaggerate the positions)
- make a board game for the agenda item and have people play it
- give an appreciation of something or someone
- tell about your hope for the community, " I want our community to be a place where...."
- tell about your wish for the world, "If I were in charge of the world...."
- have everyone write something about themselves that no one in the group knows about and might be a surprise, then read them and try to guess who it is
- share your favorite food, leisure activities, most embarrassing moment, childhood story, most influential person
- do a **popup survey** ask a question and have people stand if they answer yes. " Watch Star Trek, oldest in the family, come from a family with more than 4 siblings, like chocolate, allergic to cats, played organised sports in high school, ..."

Resource: Games Trainers Play: Experiential Learning Exercises.; More Games Trainers Play Edward E. Scannel and John Newstrom 1981 McGraw Hill. Lots of good ideas for meeting openers and games to play in meetings.

Tip Seven

Praise! Praise! Praise!

Never let any good deed or action go unheralded in the group. Say thank you loudly and publicly at every opportunity.

One of the real issues in workbased learning processes is having set participants undertake to complete a task, then not follow through. Praise can help you engender results. Recognise the value of people's contributions within project set meetings. It's cheap psychology, and it works wonders. One of the best ways to boost group morale and keep it high, is to notice peoples work and praise it regularly.

Remember though, while you should praise publically, it can be dangerous, as the facilitator, to criticise non performers publicly.

How much praise have you given lately?

How do you manage issues of limited or poor performance as a group facilitator?

Tip Eight

Facilitation Is The Key To Success

The facilitator has a crucial and demanding role:

- directing the flow of discussion
- resolving roadblocks
- summarising points
- keeping the discussion on track
- capturing ideas and digressions
- shepherding the emotions of the moment
- keeping the spirit positive and productive.

The facilitator is a tool of the group, responsible for directing the process so the participant(s) can focus on the project tasks while the learning is clearly identified. A good facilitator is everyone's ally and no one's friend.

If the facilitator contributes to the discussion, they should always also attempt to summarise what has been said. The facilitator must remain neutral on whatever issue is on the floor. A good facilitator gets a discussion going, keeps it on track, draws out everyone, and summarises the key elements.

The facilitator may also assign tasks and set completion criteria such as when a task needs to be done. A great facilitator captures the emotions of the participants, delves into the roots of concerns and feelings, and uses positive reinforcement, drama, and numerous other tricks to keep the participants happy and functioning at the optimum level.

Sometimes being impartial is difficult for the facilitator, especially if the issue under discussion is one the facilitator really cares about. It is wise to have a process in place that lets the facilitator who is conflicted step aside.

Have you found yourself in a situation where you have a conflict of interest?

How would you handle it?

Will it be a problem in your project activities?

Tip Nine

A Facilitators Checklist

Before The Meeting:

- plan
- Think about:
    - how to approach each agenda item
    - agenda items needing special formats for discussion or resolution
    - issues which will evoke strong feelings or emotions
    - contingencies for group splits or individual behaviour
- check the environment
    - furniture
    - catering
    - physical characteristics, lighting and temperature etc.
- do you have everything you need? Paper, pens? etc.
- circulate an agenda
- Review the project plan, old decisions or discussions from the last meetings minutes and clearly identify any follow ups required.
- Prepare yourself.

At The Beginning Of The Meeting:

- Greet the set members and look for tensions. Identify obvious vibes that you might need to tap before the meeting starts?
- Check in yourself to the group. Explain how you are feeling, any special things happening today, the tone. Ask for feedback and help making the meeting work well. Share your need(s) for the meeting with the group. (Remember there will be Framing the Future requirements with each set meeting)
- Check the agenda.
- Review the agenda and prioritise.
- Launch the meeting with a fun activity that energizes the group.

As The Meeting Runs

- Summarise discussions or decisions to keep everyone up to date and remember the vital role in the process of identifying the learning that has occurred.
- Manage the speaking time. Ask those who are quiet for ideas and thoughts and control the dominant speakers. But remember that sometimes people take time to become involved, strike the balance.
- Clarify discussion. If an agreement is being sought, isolate areas of agreement as they emerge in discussion.

Tip Nine

- Catch any items that have not been resolved, or come up in a discussion and ask the group what to do with them.
- Note digressions and remind members to stay on task. It might help to write related digressions up on the board and ask the group to postpone consideration of this, then later, ask the group what to do with it.
- Make sure you have eye contact with the people you speak to.
- Monitor the vibes from the group through listening and watching body language. Try to catch any unexpressed issues or feelings.
- Avoid behaviours that create a negative environment and point them out to the group.
- Watch for restlessness and take breaks when you sense the need for one. Remember, people generally dislike sitting for more than 45 minutes.
- Be sure any tasks generated are dealt with by the group.

As The Meeting Ends

- Run through all task assignments and list any decisions made so any misunderstandings can be cleared before people leave.
- Debrief the meeting with yourself at least, or with the group. What went well, what could be improved.
- Clearly identify the learning for each group member and the group generally from the meeting activities.

Tip Ten

Setting A Clear Meeting Agenda

An important meeting process is to agree on an agenda. When facilitating workbased learning projects agendas must be carefully established. Some facilitators have suggested controlling agendas can stifle creativity, while others see a real need for the structure. Whether you, as a facilitator set the agenda, or agree on it with the group at the start of a meeting there are some ideas you can consider.

- Have you thought about putting the agenda on a white board at the beginning of the meeting so everyone can see it?
- Let members set the agenda, or at least know what is on it before the meeting.
- Is it a good idea within your project set to write out each agenda item as a goal or an action?
- Is it an idea to identify the process for each item? It may be a discussion, a brainstorm for ideas, or a decision.

Agendas And Money:

Rather than writing down "discuss budget" as an agenda item, analyze the goal for the item. You may write it as a specific task that needs completing such as: define budget categories and develop tentative amounts in each category. Making a task focused agenda helps to organise the thinking of the participants and makes it very clear exactly what is being done or asked for. In an action learning environment it clearly focuses the project set on the task while you, as the facilitator can concentrate on the learning.

A common problem is prioritising the agenda. There is no bar within a Framing the Future Project to splitting into small groups to deal with an issue. One idea is for the facilitator to have the group set a time limit for discussions and when the time limit is reached the facilitator explicitly asks permission to continue.

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Tip Eleven

Setting The Flow Of The Meeting

Principles Of Learning

The principles of learning suggest that students should move from simple to complex tasks. In a workbased learning project it is wise to start with short, easy-to-deal-with items before the group moves to more complex issues. Doing easy items first builds a sense of accomplishment. As the group does this watch the vibes and take breaks when people seem restless or lethargic.

Breaks

Sometimes a break allows people to informally talk with each other about an issue and this can be exactly what is needed before the group can move forward. A good facilitator can provoke this discussion during the break. Breaks are very important to keep the energy level high. Some groups do physical activity at breaks, such a yoga, a dance or go walking in an effort to get the blood flowing again. You can facilitate these physical activities, but remember to pick activities that the whole group can do.

Give Everyone A Voice

Each group defines how members will participate and have their ideas heard. Smaller groups can be very informal. Some groups use a talking stick or some other object to symbolise who has the floor. Maintaining continuity in a group discussion becomes difficult as people are processing and sharing different types of information or the group size is larger. You could have the group use colored cards to signify different kinds of input such as green for "I have information about that," or red for "stop the process."

Sometimes a few members may dominate discussions. Some people are just more verbal, passionate or controlling than others. This can distort the group process and limit the groups learning. Dysfunctional communication should be corrected. One way is for the facilitator to ask for input from silent group members. Another way of getting all the voices heard is to break up into small groups and then have each group report their discussions.

Some issues may require significant time for discussion. The stress of making life-changing decisions, and personally risky compromises in order to move towards an abstract goal deserves lots of time for listening. Sometimes when a person goes on and on about an issue it's not really about the issue at all but about control, and compromise and fear and personal expression of all the other emotions that get tied up in working with and trusting a group.

What About People Who Are Not At The Meeting?

Not every one will attend every meeting. Advance warning of the agenda will help members decide their priorities. In some groups if members don't attend a meeting, or submit a written opinion, they have given up their voice in the decision. Other communities contact absent members for approval of any decisions. You, as a facilitator in a workbased learning project should agree the process of communication in advance. You may also

Tip Twelve

Jump Starting Discussions

Brainstorming

One way to begin approaching the discussion of a particular topic is the free-form brainstorm.

In this process:
- a question is asked
- members of the group call out responses as they occur to them
- responses are written on a blackboard or a large sheet of paper
- no discussion occurs on any of the responses until everyone has exhausted their ideas.

The advantages of brainstorming are that:
- a large number of ideas are gathered
- everyone can contribute
- people can easily see all the responses at one time on the white board
- no one is threatened by having to defend their ideas as they are written on the board
- other ideas can be triggered as responses are listed.

Often a synergy builds and ideas come rushing out, sometimes faster than they can be recorded. If you are leading this exercise you should:
- monitor the rate of responses so ideas are not lost
- call on non participants for ideas from time to time
- not allow discussion, judgement, categorisation or evaluation of responses during the brainstorm
- do a round robin, asking each person in turn for an idea to end the brainstorm.

It may take some practice for the group to loosen up and let the ideas flow. Some groups do a warm up exercise such as asking for favorite dishes, or some other subject such as 'how many uses can you think of for a paper clip'.

Using Proposals

Sometimes discussion about an agenda item can be jump started by using a proposal. An effective proposal gives every member as complete a picture of the issue as possible, without being more than one page. Some elements to include:
- an overview which describes why this item is important and worth group time
- goals you want the issue to achieve
- the items background
- a review of the advantages and disadvantages of the item.

Once a proposal is introduced the listing of issues and concerns can be brainstormed and worked through. Discussion about the issues and concerns follows and then a group position can be finalised. Alternative proposals can also be established at this point.

Sometimes starting a discussion with a proposal can lead the group astray by starting at a particular place that may exclude other ideas or options. Using a reflective framework can help you to avoid this eventuality

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Tip Thirteen

When Should A Discussion Be Reopened?

Workbased learning is not a static process. Decisions made on one day often need to change on another. The basis of plan, do, act, reflect encourage reflection and change. Reopening discussions can use a lot a group time to rehash the same issues as before and so having some agreement about how to reopen decisions is wise.

Some workbased learning sets allow for a review of a discussion if a certain number of people approve of bringing up the issue again. Others use a different approach, in any case your group should agree on an approach.

Be careful about reopening discussions for people who do not attend meetings. Rehashing the same discussions over again for the benefit of one person sets up a situation that is ripe for frustration, especially if the same individual is missing meetings and holding up the rest of the group. You, as the facilitator should have the group agree a process of informing these people between meetings and set some ground rules about this eventuality at the outset.

Getting Input From Large Groups

The cooperative process frequently requires giving information and getting input from everyone in the group. In large groups this can take considerable time, particularly if the group is a mixture of educational and industry members. Even small groups can take lot of time to hear everyone. Your task is to manage the time the group takes.

A very simple way to deal with large groups is to break them up into smaller groups. This is especially helpful for discussions where you want people to talk with each other. Then have one person from each small group report on their discussion when the large group reconvenes. You can break groups randomly or let people choose which group they want to talk with. This can be an effective action learning process, particularly where the group is comprised of different disciplines.

Another way is to create ways outside of meeting time to gather opinions. Carefully worded questionnaires can quickly gather trends. To make collation of the responses easy,

- number the questions
- use multiple choice questions or forced rating scales
- use simple language
- make returning the questionnaire easy

Another way is to hold "discussion circles" to talk about an issue. This is a great activity over coffee or some other informal atmosphere. You can also solicit opinion informally through email.

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Tip Fourteen

Meeting Formats

In addition to large group settings you should experiment around with other ways to hold meetings. Think about:

- different locations
- different media (internet/teleconference)
- different times
- different processes.

Processes

Break a large group into smaller groups that work independently then report back. This can be a good way to generate ideas and discussion quickly, particularly when planning Framing the Future projects.

Another idea is to create stations, where a large group breaks into smaller groups and works on one activity for a while, then moves to another activity. This can be a good strategy when a workbased learning project is starting to deal extensively with project tasks.

Use a decision board to generate meetings. An issue is published on a bulletin board, with a time and place for a meeting. Whoever is interested in the issue shows up at the meeting and the decision is made there. Email lists can easily achieve the information cirucluation for this type of approach.

"Fish bowling" is a way to get people who feel strongly about an issue talking. 4-6 people sit in the middle of the larger group as a circle within a circle. They each make their point, and there may be discussion. When someone in the centre feels they have been heard, they move to the outer circle and someone else takes their place.

During a discussion use coloured cards. Members raise a card to signify a contribution. The organisational idea is that people in large groups are in different places in what they need. Some people may have questions, some may have opinions to share, some may be ready to decide, some may have answers or information to share. Each card signifies a different type of contribution. Coloured cards create a structure for giving input which can be good in the early or pressure stages of a project sets life.

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Tip Fifteen

Ending The Meeting

Have some sort of end of meeting regrouping, especially after heavy meetings. A good way to do this is by asking 'What have you discovered today?' as a basis for group reflection. Having a closing can be a bringing together again. A session evaluation questionnaire can gather feedback for how people feel, clear the air, or critique the meeting process. Evaluation forms also bring a closure and signals the end of the meeting. Some model evaluation forms can be found at the Framing the Future website.

Remember, feedback is the breakfast of champions!

Random Tips

- Organise meeting documentation by date, then use a red felt tip marker to number the pages consecutively at the top. This makes it easy to see which 'pages' are missing or out of order.
- Separate decisions made and keep them in a separate document as a running file. You could also mark the decisions with highlighter pen to make them easy to find.
- If you do round robins, pass along a watch with a second hand and set a limit to comments.
- Use turning points, times when meetings are really intense, as tools for your reflective framework.
- Write the issue being discussed on a blackboard or on paper so meeting participants can see it and keep track of what is being discussed.
- Deal with business issues and personal and interpersonal issues in separate meeting sessions.
- Don't let the end of the meeting deadline push the group into a poor decision. The "lets just make the decision and get out of here" mentality often results in a poor decision. It's better to take an extended break your role is to clearly identify the learning that has occurred!

Tip Sixteen

Maintaining Group Memory

Document all decisions and points of learning from the meeting.

Minutes or notes of meetings are the group's memory, and every effort should be made to keep them accurate and up to date.

If records of group decisions are not kept, you will very likely have to make the decision again later and have problems in compiling the final Framing the Future report.

Records should be available in some form to every group member, or posted in the meeting space so they can be read (or perhaps on the groups web sight).

The action minutes format works well. Divide a paper into two columns, with the left column taking up 1/3 the page and the right column using the remaining 2/3rds. The agenda item goes into the left column, discussion notes goes into the right column. In the left column under the agenda item go the names of people who have action items and any dates for completion of those items. If a decision is made, write the word Decision on the left side, and the full text of the decisions on the right. This system makes it very easy to scan a large number of minutes for information and decisions.

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Workbased Learning Facilitator Profile

Facilitator's Role

The role of the facilitator is to:

- capture the learning of the project group
- manage the completion of workbased tasks
- fulfill the reporting functions required by the Framing the Future project.

Tasks

The facilitator manages:

the group process by using a consultative approach that:

- clarifies the process of workbased learning that will be used
- establishes and monitors an action plan throughout the project time
- establishes a process where individuals can identify their own learning needs
- creates a process where participants can identify the learning from their project activities and experiences including:
  guiding and counselling participants about process and content where applicable
  introducing new ideas, concepts and alternatives
  organising learning activities that meet the needs of the group
  challenging participants to critique and question.
- establishes and manages group reflection processes
- ensures participants take responsibility for the project activities and their own learning
- creates a climate of critical questioning
- varies the level of direct participation by the facilitator as appropriate throughout the project.

the interpersonal roles within the group by:

- building the project group as a team
- demonstrating and employing active listening skills
- managing group conflict
- minimising stress, frustration and depression within the group
- avoiding judgement on group proposals
- creating an environment of safety and enjoyment.

the group's administrative process by using a consultative approach that:

- keeps the group and other stakeholders advised of progress
- organises meetings and follows up the outcomes of group activities
- co-ordinates or writes Framing the Future reports
- accesses and co-ordinates resources
- co-ordinates group communication

Personal Attributes

The facilitator needs to have:

- understanding of the context of training within the Vocational, Education and Training sector.
- ability to create a positive learning environment
- ability to plan and manage project task times over a four to six month project time-table.
- ability to communicate in a non-threatening and positive manner
- ability to organise and resource group meetings and activities
- ability to innovate and problem solve
- experience in the facilitation to Framing the Future projects (or equivalent) or organisational development activities.
- ability to access content expertise from industry and educational sources outside the workplace.

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EFF-089 (9/97)

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