

Learning Companion

for Facilitators

-2016-

A self-learning portfolio tool for facilitators in non-formal education, developed by the Theodor-Heuss-Kolleg of the Robert Bosch Stiftung and MitOst.

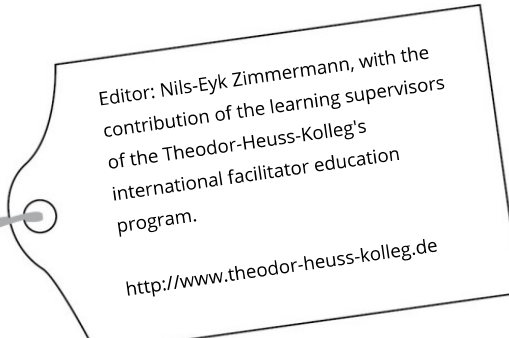
MitOst **Theodor
Heuss
Kolleg**

Supported by

Robert Bosch Stiftung

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ISBN: 978-3-944012-12-4



Editor: Nils-Eyk Zimmermann, with the contribution of the learning supervisors of the Theodor-Heuss-Kolleg's international facilitator education program.

<http://www.theodor-heuss-kolleg.de>

The Role of a Facilitator

Facilitating training in non-formal education is often different from the teaching we experience in schools. The traditional model of a teacher mainly *disseminates knowledge*. Facilitation means to *accompany people during a learning process* which is a process of developing competences. Facilitators create good conditions for the individual to form knowledge and competences voluntarily, and according to their specific needs. This can be referred to as *empowerment*.

Facilitation therefore seeks to focus on the *existing knowledge, skills and potentials* of every individual. In teacher-centered learning the teacher is the cook and hopes that the group will enjoy the dish and ingredients. In a facilitative approach everyone cooks together. In the best-case scenario everybody is given the dish, the nutrients and flavors that help him or her best.

This example makes it clear that facilitation is more than simply allowing everybody to do whatever they want. It does not mean that a facilitator is no longer a cook. Nor does it mean that plain cooking cannot lead to tasty results. But many cooks may spoil the broth.

Situational and Shared Leadership

The example shows that both your knowledge and experience are very important, in facilitation and in classic teaching. The difference lies in the attitude towards your target group. As a facilitator in empowering education, you see them as fully responsible. They know which nutrition and ingredients work best for them. They decided whether to cook a pork soup or to fry a tofu steak. Your methodological skills help them to bring the dish to a good conclusion. Kitchen knowledge, when applied to non-formal education means that you help learners to identify a goal, to develop action strategies, to reflect on their existing competences, and identify challenges.

By contrast, in classic educational settings, the role of a facilitator was clear – it was in front of the group. In our

philosophy it is changing: sometimes we are still in front, but more often in the background, or observing from the side, or moderators or coaches. Sometimes even participants take the lead.

The challenge is to find the position that works best for every part of the learning process. Regarding your place in the training, you might face concrete questions like these: Is input needed here or should I focus on active group work? What part of the input that I have prepared is really useful?

Relations

When the boundaries between facilitator and participants become more fluid, this can present a challenge to modern facilitators. As low-hierarchical people we have easier access to the target group. And sharing the same values and vision of a participative and pluralistic civil society is a prerequisite for a trusting atmosphere where participants can open them to others.

On the other hand, situations continually crop up where facilitators must give orientation, act as a role model, or inspire with experience or expertise. In contrast to a participant, we must always be prepared to take on the full responsibility for the group process.

Therefore we should take care to balance private passion and affection with the professional mission and the concrete goals of the training. In this sense we'd like to encourage you to reflect on your style as a learner and a facilitator.

Diversity-Consciousness

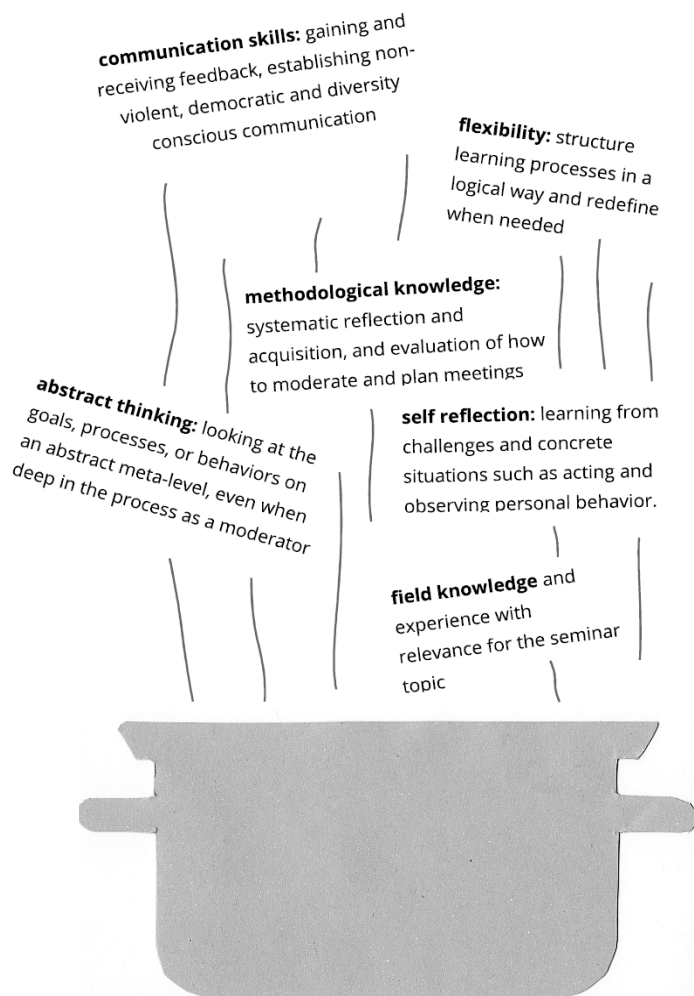
Focusing on individual needs implies the insight that everybody is different. Our participants have different styles, attitudes, experiences, or cultural and social backgrounds. Most school systems often tend to homogenize this diversity. Facilitation means to respect and even to appreciate the(se) difference(s) as a resource. In the best-case scenario everyone gains from the realization that different roads may lead to

similar goals and that it is often the other strategy that might help you in your work.

On the other hand the challenges are clear. First, when taking consciousness of diversity seriously, we need to integrate it into real life conditions of limited time resources, a heterogeneous, not always consensus-oriented group, and an environment outside our working place, where diversity is seen as something alien. Second, when individuals or groups violate our non-violent and democratic principles – these need to be (re)established. Diversity consciousness is a learning field and therefore we cannot assume that everybody recognizes our values. Furthermore, our task is to act as role models and to convince through authentic and credible action.

Ingredients

This learning companion should serve as a good tool on your way during the next months. To reuse the kitchen metaphor, these are the ingredients, we recommend to use:



Structure of the Companion

A is about your general attitude as a facilitator and your learning style as well as your development goals.

B focuses on the institution and the concrete learning environment in which you are facilitating with its explicit and implicit expectations.

C is the section with templates for concrete practice. Therefore the pages of this section may be copied and filled out for practice each time.

D is all about the evaluation and reflection of your whole learning process.

◀Competendo

Our online toolbox for facilitators offers more information to a topic: <http://competendo.net>

A Self-learning Tool

The idea of this learning companion is to help you find *your* definition of a facilitator through observation, practice and individual work. What you save here represents in sum your portfolio of competences and characteristics. The companion helps you to collect your experience and makes it accessible for (self-) evaluation in a systematic way. We encourage you to write, paint, draw or however it is comfortable for you to express yourself.

Beyond individual learning it might be helpful for you to include other people. Different perspectives complement the picture. Therefore your co-facilitators or participants in a training session might give you valuable feedback. Other facilitators may inspire you with their experience and their observations.

We wish you inspiration, motivation, fun and successful work as a facilitator!

The Learning Supervisors
and Program Managers
of the Theodor-Heuss-Kolleg

A

*Your Attitude
and Personal
Learning Goals*

Your symbol

Which symbol do you connect with facilitation?

A large, empty rectangular box with a dashed border, intended for drawing a symbol related to facilitation.

A1

Professional Facilitator

You bring with you experience and expectations regarding facilitation into your facilitator's team. Generally speaking, what in your opinion characterizes a good facilitator? If you would like to, assemble a collage...



*Characteristics
of a facilitator*

Your Competences

You described an ideal facilitator. Another way to describe him or her is through so-called competences. According to a widely recognized definition these are your abilities *“to meet complex demands, by drawing on and mobilizing psychosocial resources,”* including skills and attitudes. Although your competences help you in a whole range of activities, there are some that have specific relevance for your role as a facilitator in non-formal education. Please describe your competences that qualify you for the role of a facilitator.

Competences of a facilitator

Task-specific factual competence

Specific skills, knowledge and abilities you need for your work as a facilitator in non-formal education; values, structure of the cooperation program, non-formal education, specific knowledge about the topic, democracy or civil society

Methodical competence

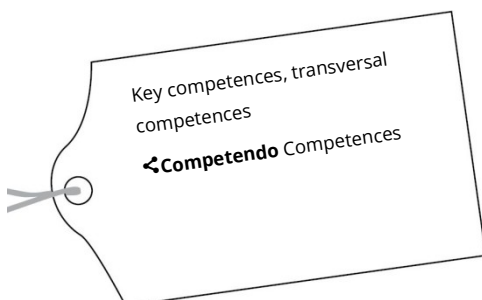
Ability to select, plan, and implement problem-solving strategies; critical thinking, learning ability, time management, presentation skills, training design, selection of methodological approaches

Social competence

Ability to: exchange information, communicate, establish and maintain social relationships, work in a team, empathize, empower leadership

Personal competence

Refers to attitudes towards the world in general, work and the self: motivation, accuracy, commitment, flexibility, responsibility



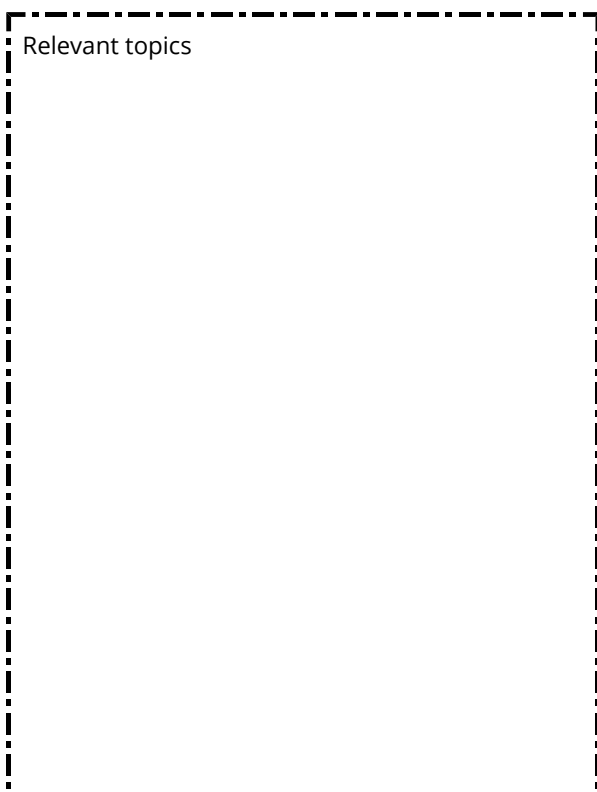
Topics & Knowledge

Your expertise

You have already identified what an ideal facilitator needs to know. Describe your expertise regarding relevant topics, knowledge and methodology on how to facilitate:

What do you want to explore?

Relevant topics



Methodology



My Power & Responsibility

As a facilitator you take on responsibility in a leading role. Different people have different styles to deal with this. Although facilitating in an empowering way means applying your approach to the needs of the target group, this can imply many different things. What does it mean for you?

Laissez-faire

Which situations do you remember, in which you or another facilitator did not use as much of his or her authority or power as was required of the situation? What should have been done?

Authoritarian

Which situations do you remember, where your or another facilitator used too much of his or her authority or power? What should have been done instead?

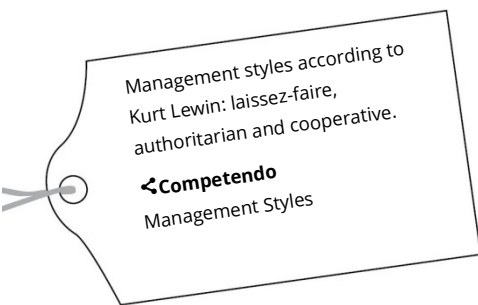
Your tools

List the three best measures that help you to observe if you lead according to your principles, and what helps you follow them:

①

②

③



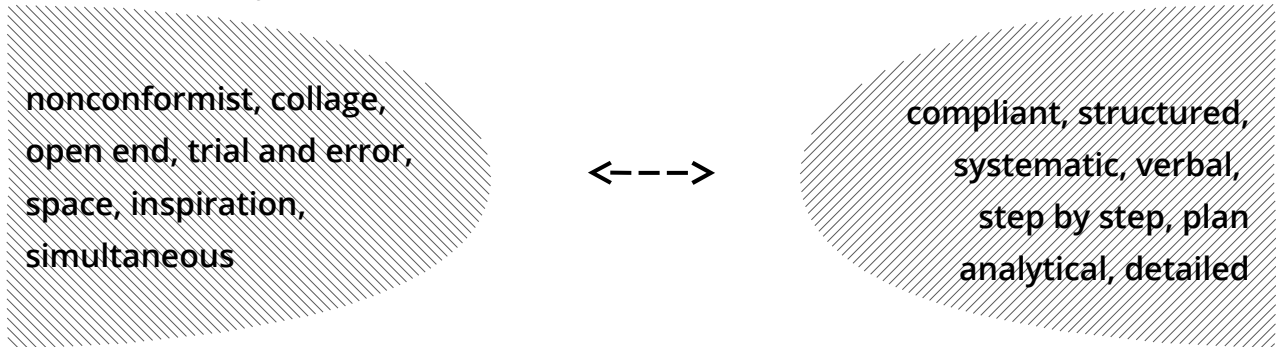
Management styles according to Kurt Lewin: laissez-faire, authoritarian and cooperative.

← **Competendo**
Management Styles

Learning Style

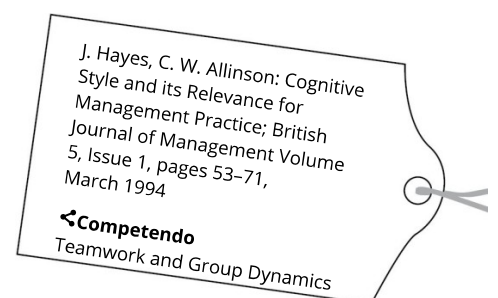
There are different paths to insight. Some people like to act in a structured, logical and step-by-step manner. Other people act intuitively and have no problem with open-ended tasks. There is a specific way of processing information in each learner's brain caused by spatial specialization (lateralization of brain function). In a popular way it is explained as a general division between the left brain, cognitive and abstract hemisphere and the right brain, more intuitive non-verbal, social or spatial hemisphere. Some validated models exist that help you to reflect on your way of learning and thinking, such as Allinson/Hayes' Cognitive Style Index. It places individuals on a continuum between the two poles of intuitive and analytical. Where on this continuum would you locate your stylistic orientation?

Your learning style



Which of the words above best characterize your learning style?

Most people are somewhere along the continuum, therefore you may use words, associated with both domains!



Personal Characteristics

You probably have an idea in your mind which specific characteristics a good facilitator has. Facilitators usually orient themselves on role models, experience in group processes or participants' expectations. Our experience says that there is *no one clearly dominant style* of personality that is better suited than others for the work as a facilitator. *Diversity in a team* makes the difference.

A more introverted facilitator will understand the needs of quieter learners more intuitively than an extroverted personality who in turn better reflects the needs of very active people. For a person who likes to come quickly to the point, the moderation of an answer-open discussion may be a challenge; for a person who likes the process of discussing, coming to the point is more difficult.

In general, all characteristics have positive potential for facilitation. It is down to you and your team to perceive and use the different qualities of your members in an efficient way.

Your characteristics

Try to describe your personality in one sentence that includes these domains.

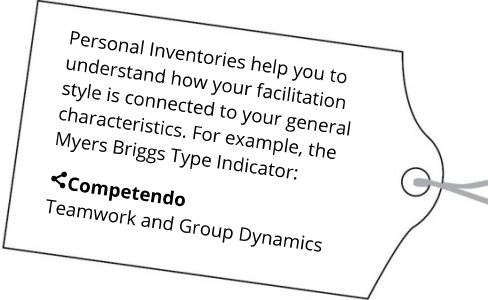
All characteristics form a specific individual profile. Which of these keywords and aspects characterize you best?

Way of thinking
Intuition, analysis, open-endedness, outcome orientation, structure, feeling, discipline, inspiration, logic, non-conformism...

Acting and Deciding
Process-orientation, decision, feeling, action, thought, judgment, perception, holism, pragmatism, team player, leader, compromise, straightforwardness, trial, plan...

Attitude towards People and Groups
Introversion, extroversion, conversation, reservation, inner thoughts, group activity, individual space, loudness, tranquility, trust, altruism, anxiety, excitement, team, lead, support,...

Sensual Perception
Detail-orientation, the big picture, look, touch, hear, read, diagrams, texts, pictures, sound, smell...



Strengths & Weaknesses

Each person has strong sides that he or she can rely on, and weak sides that he or she would like to change or improve, or maybe just need to learn to accept.

- What are your strong sides that help you in facilitating?
- What are your weak sides that might be difficult for facilitating?



Weaknesses

My Developing Goals

Comparing your picture of a good facilitator with the competences, knowledge and personality you have, might show a gap you have to fill. What do you need to develop? Please focus on concrete, practical goals for the next months.

Competences

Skills and knowledge that you need for facilitation.

Attitude

Your general way of feeling and thinking about training, participants, facilitation, civil involvement, democratic values.

Personality

General patterns in how you perceive the world and your behavior in reaction to these perceptions.

Style of facilitation

Your style of moderation, inspiration, planning or evaluation during a training session.

My Learning Plan

Self-learning implies that you shape your learning environment and decide independently when and what you want to learn. You therefore need to balance your tasks as a facilitator with your everyday life. This checklist is about the environments, instruments and conditions that create optimal learning conditions for you.

Environment & space

- Where in your everyday life is the best place for learning?

- What is the optimum time for reading, thinking, or planning? How often will you find this time?

- Which people do you (not) need around you?

What inspires you?

Learning tools

Everybody has different preferences for saving and reflecting knowledge. What kind of tools will you use during your facilitation practice? Digital protocols or manual sketches? PDFs or hard-copies? Talking to colleagues or writing? Drama or experiment?

Learning Goals

Goals	Learning Space(s)	How, with whom, through what kind of action
In example: Improving presentation skills	Preparation time at home Seminar	Book: Presentation techniques Presentation, team feedback

New Content & Methods

Topics

Concrete Sources

Topics	Concrete Sources

B

Target Group and Institutions

Facilitators contract to a client with very specific goals and interests. This part focuses on the institution and the concrete learning environment in which you are facilitating with its explicit and implicit expectations.

Institutional Goals

You are a contractor to a program and with this contract, you agree to work according to institutional goals and expectations. Before you wrote a letter to yourself according to your goals and motivations. Now let's have an abstract look at their goals.

What is the difference to other organizations?

The difference to other management or leadership training you know in terms of topics, attitude, and targets.



Ethics & Facilitation

Work in a certain environment addresses certain ethical values. Values are principles that give us orientation on what we want to do and how we do it. Therefore the challenge is to act according to these principles, not only in ideal conditions. But it is important to reflect these values in a difficult atmosphere, such as in a conflict among participants. Please elaborate on which are the important principles for you in relation to the fields below.

<i>Self-Empowerment</i>
<i>Participation</i>
<i>Management</i>
<i>Initiative</i>
<i>Conflict</i>
<i>Democracy</i>
<i>Minority</i>



Impact for Participants

Empowerment in your words

You learned in your facilitator's training or in presentations about the empowerment concept that underlies your work as a facilitator. Please paraphrase it in your own words.

Civil initiatives

During the year, participants are motivated to implement civil initiatives in their society. Describe these initiatives – and how they change society:

Everything is clear...

...or not? What is not consistent or unclear?

B4

Relation to the Program

You already know other facilitators from the Theodor-Heuss-Kolleg and from your program. How would you describe them? Please do this with 5 attributes

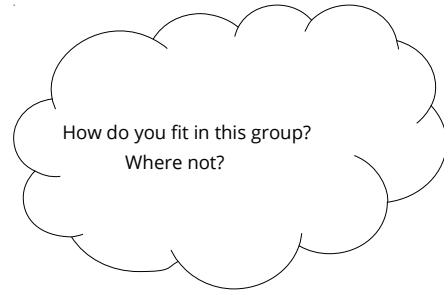
① _____

② _____

③ _____

④ _____

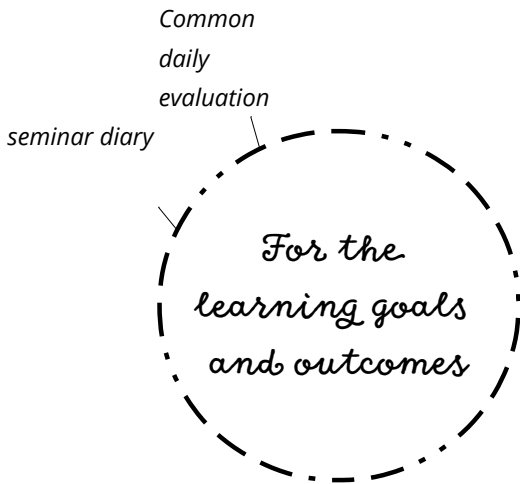
⑤ _____



Is there a difference between the program and the THK?

Participants' Responsibility

Collect concrete ideas for strengthening participants' responsibility



← **Competendo**

Cooperative Learning,
Facilitating Competences,
Addressing Self-responsibility

Relation to Participants

The idea of peer facilitation has a great advantage over other approaches of facilitation. Peers often understand the reality of their participants better. Or they may mobilize more empathy or explain things in an easier way. Peer facilitation can have two meanings. First, qualifying and using those people for facilitation that feel close to the target group and have similar experiences. Second, when participants in a group intensively learn from each other's experiences, feedback or best practice.

We often hear that younger facilitators especially enjoy the spirit of a group and become partially involved in the group's dynamics. On the one hand, this supports the idea of peer facilitation. On the other hand, too much involvement may influence your professionalism: your preparation may be lacking, your critical distance and evaluative competence may suffer, and sometimes you may become disoriented as to where you belong.

For non-peers, the question of the right balance between closeness to and distance from participants is also important. What if you do not represent the participants' group in terms of age or social background? To what extent do you then need to actively shape your relation to participants – where is distance the appropriate strategy in this case?

Closeness & Distance

What kind of relation do you want to have to the participants on the continuum? Describe.

Closeness**Distance**

What should not happen?

How can you avoid it?



←Competendo

Facilitators and Leadership,
Cooperative Learning

Bidirectional Feedback

Feedback is both a necessity and a gift. We emphasize that you should focus on the second. It helps you to improve yourself, to explore your blind spots and to become stronger towards your performance group. Therefore please reflect on how you like to *receive* and to *give* feedback.

Form and style

- In a group or one-to-one
- Informally or as part of a feedback topic during your team meeting
- Who in your team makes it easy for you to receive feedback?

Content

- Receiving feedback: Define in advance what kind of feedback you'd like to get from whom.
- Giving feedback: To whom do you want to give feedback? For what? Focus only on aspects that can realistically be changed.

Remember

- Always include the positive aspects.
- Describe, don't evaluate.
- Be concrete, don't generalize: Use concrete examples from real situations
- When you are invited by someone – focus on topics that the person defined first.
- As receiving person, act as you would with any gift: Don't comment or discuss anything. If the gift doesn't appeal, you don't have to use it.

How is it?

Receiving feedback

Giving feedback



B8

My Needs in the Team

In checklist **B4** you reflected your relation to the program and the people that are representing it. Here you can define your needs to find your way into the structure and into your facilitators' team:
What is important to you during cooperative work?

- Personal needs
- Globe
- Time proportions of preparation, leisure, reflection
- Preferred working style
- Space

...and how I address them

How may you shape the surrounding and the teamwork according to your needs?

← **Competendo**

Team Collaboration for
Facilitators

C



The Concrete Training



This section offers templates for concrete practice. Therefore the pages of this section may be copied and filled out each time.

Online you find a PDF with interactive form elements for easy use with your electronic device during a seminar.



THK

<http://www.theodor-heuss-kolleg.de/service/materials/companion-for-facilitators/>

c1

Target Group

What characterizes the specific target group of your training?

And you?

- Why do you like to work with them?
- What do you gain through working with them?

C2

Preparation

My learning goals:

Discussion points for my learning supervisor:

My tasks for preparation:

- Content
- Methodology
- Organizing team work
- Organization
- Communication
- Public Relations

Aspects to be discussed in advance in my team:

Assessment: Facilitation

You were responsible for some parts of the training and you conducted methods or program parts. How it was from your point of view? Every group in your training may find answers: facilitators in a team, participants, learning supervisors or external experts.

Your Task

Describe, what you did...

Evaluation

...how it was...

Epiphany

...what you get out of it

Who

...may help to find answers.

<i>Your Task</i> Describe, what you did...	<i>Evaluation</i> ...how it was...	<i>Epiphany</i> ...what you get out of it	<i>Who</i> ...may help to find answers.

C4

Assessment: Feedback

Remarkable feedback that I got from my co-facilitators, participants and from other persons such as guests, supervisors, experts, or representatives of the training facility. Mark the aspects that were new to you.

Positive aspects

Proposals & Challenges

Participants	
Co-Facilitators	
Third Persons	

Please include *positive* and *critical* aspects. Please *describe*, don't evaluate.

Assessment Moderation

General Concept

Goals

Have you achieved your goal(s)?
Which goals?

Methods

Were you able to implement your
methodological concept?

Visualization

Posters, visual elements, structure,
plausibility,...

Start

Introduction, explanations

What observations prove that you
succeeded or did not succeed?

Interaction

Co-moderator(s) and participants

What observations prove that you
succeeded or did not succeed?

How would you evaluate your interaction
with the co-moderator(s)?

How did the group react to your approach?

Saving Outcome

Saving the outcome, conclusions

What observations prove that you succeeded/did not succeed?

Space

Seminar Room

Decoration, seating arrangement(s), flip-charts, use of walls and posters,

Body

Aspects of your body

Eyes, mouth, head, hair, arms, shoulders, hands, legs, feet, smell, voice

Location

Interpersonal distance, position in the room, seated position, use of space

Interactions

Gestures, facial expressions

After the Seminar

Preparation

Goals

Have you achieved your goal(s)?
Which goals?

Mood and attitude

With what kind of feelings and expectations did you arrive?

Support

What or who supported you?

Process

During your practice you documented and evaluated what you did as a moderator or co-facilitator.
Please compare this to thinking about these questions:

Target Achievement

How did your plans work out?

Changes

What could you modify for the next time?

Support

What or who supported you?

Feedback

During your practice you documented and evaluated the feedback from participants, co-facilitators and third persons. Which general conclusion(s) would you like to draw from it?

Concrete Cases

Describe two cases or observations that fit best to your learning goals and think about what you might discuss with your learning group or learning supervisor.

Case:

Case:

Your Impact

What impact might the seminar have for the participants from a short- and a mid-term perspective?

C7

The Group and My Team

Target Audience

- Were your expectations of the target audience fulfilled? What differences were there?

- What relationships did you have or did you create with the participants?

- How would you evaluate this?

Teamwork

- How did you experience teamwork with the facilitators?

- In checklist **B8**, you reflected your needs in advance of your facilitators' team. Where you able to address these in a successful way? What helped you or might help you to do it?

- What methods or approaches did you learn that support teamwork?

Disagreement & Conflicts

What did you and your team's solutions for managing disagreements or conflicts look like?
How would you evaluate them?

Goal Achievement and Next Steps

Goals Before

Results



Challenges



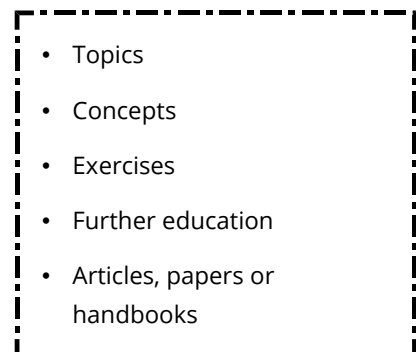
Obstacles

Were there any obstacles that prevented you from gaining new competences during the working process?

Next Steps

- What ideas do you have for facilitation?

- What measures do you have to continue the learning process?



- Topics
- Concepts
- Exercises
- Further education
- Articles, papers or handbooks

D

Evaluation & Perspectives

All about the evaluation
and reflection of your
whole learning process.

Professional Facilitator

At the beginning you thought about what your ideal professional facilitator might look like. What do you think now after having worked in the “kitchen of empowerment” for a while?

*What tools, raw materials and
skills does a facilitator need?*

Different Approaches

During the year you met different approaches to non-formal education and facilitating empowerment.
Please collect them here:

Most promising concepts

To be critically discussed

Plan-Process Evaluation

Training over several days, and smaller sections of it, consists of three parts: planning, implementation and evaluation. Please activate your experience: Which aspects of each of the three parts do you need to pay attention to? What did you successfully implement and what is still a development goal for you?

Planning

My competences and what is left open:

Process

My competences and what is left open:

Evaluation

My competences and what is left open:

Perspectives

Future as a facilitator

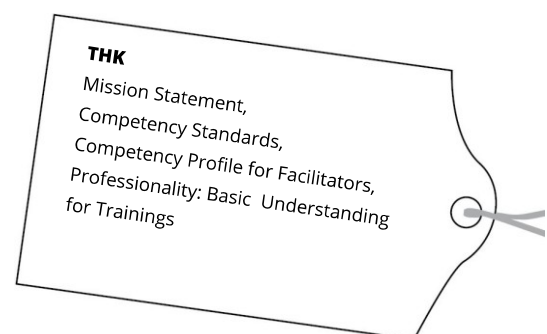
What does my future in facilitation look like? Motivation, profile, economic aspects...

Offerings & cooperation

Which providers, experts, or partners may be interesting for a closer cooperation in the future? Mention as well how they may become interesting.

Self-learning

How can I continue the learning process?



Evaluation Talk with the Learning Supervisor

These questions may help you prepare for the evaluation talk with the learning supervisor.

The year

- Which relevant qualifications, training, etc. did I attend?
- Where else did I gain relevant experience (internship, other training, private life, work)?
- Who or what influenced my development as a facilitator?
- Who or what supported me in my learning?

Taking stock

- Which abilities and competences do I take from this year-long learning?
- What methods and exercises do I know?
- Which ones do I really like applying? And why?
- Which ones do I never apply? Why?
- My strong sides as a facilitator are:
- Disappointments were....
- To what extent did I achieve the goals I set myself for this educational year?

Collaboration

With the learning supervisor, the Theodor-Heuss-Kolleg, the program

The future

- Which role will facilitating have in my life?
- What attitude and style do I have?
- What are my next learning steps?

My conclusion of the learning year is....

Competendo

The toolbox with the Theodor-Heuss-Kolleg's and its partners' free online sources. You will find descriptions of methods, checklists for facilitators and your target groups as well as useful links to other sources for training and empowerment.

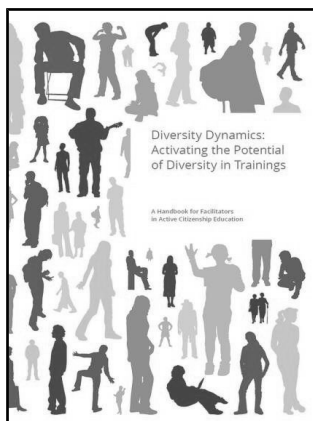
www.competendo.net

More Handbooks

**Theodor
Heuss
Kolleg**

www.theodor-heuss-kolleg.de

Diversity Dynamics:
Activating the Potential
of Diversity in Trainings



English, Ukrainian

Mentoring Handbook
Providing Systemic Support
for Mentees and Projects



English

Environment and Civil Involvement
How Can We Connect Education for Sustainable
Development and Active
Citizenship Empowerment?



English, Armenian